

WESTMORLAND AND FURNESS SCHOOLS FORUM

1 November 2023, Microsoft Teams Meeting, 9.30am

AGENDA

PART 1: ITEMS LIKELY TO BE CONSIDERED IN THE PRESENCE OF THE PRESS AND PUBLIC

Item	Item name	Papers	Responsible Member
1.	Appointment of Vice-Chair		
2.	Membership Update - Consideration of Forum Member vacancies	Attached	All
	i. PVI Representative.		
	ii. Maintained Primary Schools Representative.		
3.	Apologies for Absence	Verbal	Clerk
4.	Exclusion of Press and Public To consider whether the press and public should be excluded from the meeting during consideration of any item on the agenda.	Verbal	All
5.	Declarations of Interest	Verbal	All
6.	Minutes of Previous Meeting (20 September 2023) and Matters Arising (Action Log)	Attached	Chair/Clerk
7.	School Funding Formula 2024-25 Consultation outcome	Attached	Amanda Chew

Item	Item name	Papers	Responsible Member
8.	Maintained Schools De-delegated Budget	Attached	Amanda Chew
9.	Early Years Funding Formula	Attached	Amanda Chew
10.	High Needs Budget Monitoring Q1	Attached	Amanda Chew
11.	Schools De-delegated Contingency Budget Monitoring Q1	Verbal	Amanda Chew
12.	Delivering Better Value for SEND	Verbal	Julia Dean
13.	Working Groups	Verbal	All
14.	Dates of Future Meetings and Forward Plan	Verbal	Chair/Clerk
	i. The next meeting of the Schools Forum will be held on Wednesday 17 January 2023. The meeting will begin at 9.30am and will be via Microsoft Teams.		
	ii. Westmorland and Furness Schools Forum Forward Plan 2023-24 (Attached)		

PART 2: ITEMS LIKELY TO BE CONSIDERED IN THE ABSENCE OF THE PRESS AND PUBLIC

Membership of Westmorland & Furness Schools Forum

Membership category - Schools and Academies	Number of positions	Members
Maintained Primary Schools	5	<ol style="list-style-type: none"> David Spruce, Appleby Primary School Ruth Webster, St Paul's, Barrow Ian Nichol, Leven Valley Primary David Natrass Michelle Hughes
Maintained Secondary Schools	2	<ol style="list-style-type: none"> Stephen Gilby, Ullswater Community College Matthew Hardwick, UVHS/Emma Aubrey, Dowdales School
Academy		
- Primary	1	<ol style="list-style-type: none"> Huw Davies, Ghyllside School
- Secondary	4	<ol style="list-style-type: none"> Jon Hayes, Queen Katherine School Simon Laheney, Furness Academy vacancy vacancy
- Special	1	<ol style="list-style-type: none"> Rachel Slattery, George Hastwell
Maintained Nursery	1	<ol style="list-style-type: none"> vacancy
Special Schools	1	<ol style="list-style-type: none"> Dan Hinton, Sandgate School
PRUs	1	<ol style="list-style-type: none"> Lisa Balderstone, Newbridge House
Total	16	
Membership category - Non-School Members	Number of Members	Expression of Interest
CE Diocese	1	<ol style="list-style-type: none"> Charlotte Tudway / Laura Watson
RC Diocese	1	<ol style="list-style-type: none"> Michael Merrick / Julie Jones
16-19 Providers	1	<ol style="list-style-type: none"> vacancy
EY/PVIs	1	<ol style="list-style-type: none"> Peter Graveson?
Teaching Associations	1	<ol style="list-style-type: none"> Andy Brewerton, NEU
Non-Teaching Associations	1	<ol style="list-style-type: none"> vacancy
Total	6	
Total Forum Members	22	

WESTMORLAND & FURNESS SCHOOLS FORUM

Draft MINUTES OF THE MEETING HELD ON
20 September 2023
via Microsoft Teams

PRESENT

Emma Aubrey (South Maintained Secondary)
Lisa Balderstone (PRU)
Andy Brewerton (Teachers Professional Association)
Huw Davies (Primary Academy) may be late
Stephen Gilby (North Maintained Secondary)
Jon Hayes (Secondary Academy)
Daniel Hinton (Special Schools)
Julie Jones (RC Diocese)
Simon Laheney (Secondary Academy)
Ian Nicol (South Maintained Primary)
Rachel Slattery (Special Schools Academy)
David Spruce (North Maintained Primary School)
Sue Sanderson (Cabinet Member – Children’s Services, Education and Skills)
Ruth Webster (South Maintained Primary)

Officers in Attendance:

Mil Vasic	(Interim Director – Children’s Services)
Julia Dean	(Senior Manager – Education and Inclusion)
Susan Milburn	(Group Accountant)
Amanda Chew	(Service Accountant)
Christina Summerfield	(Forum Support)
Jonny Horn	(Forum Support observer)

Observers:

Apologies for Absence

Matthew Hardwick (South Maintained Secondary)
David Natrass (North Maintained Primary)
Charlotte Tudway / Laura Watson (CE Diocese)
Marie Barnes (Senior Manager)
Sian Rees (Strategic Lead for Children’s Services)

PART 1: ITEMS LIKELY TO BE CONSIDERED IN THE PRESENCE OF THE PRESS AND PUBLIC

1. **Welcome from the Director of Children's Services – Mil Vasic**
Mil welcomed all to the meeting and introduced Jonny Horn who will be taking over the role of clerk. All members introduced themselves.

2. **Appointment of Chair**
A nomination form was received from Stephen Gilby during the appointment process. Mil Vasic proposed Stephen as chair, and Emma Aubrey and Daniel Hinton seconded the proposal.

3. **Appointment of Vice-Chair**
There were no nominations submitted to the clerk for Vice-Chair during the appointment process. Forum members will consider potential candidates with a view to appointing a vice-chair at the next meeting.

4. **Apologies for Absence**
Listed above.

5. **Exclusion of Press and Public**
It was agreed that all items would be considered in the public domain.

6. **Declarations of Interest**
There were no declarations of interest.

7. **Minutes of Previous Meeting (14 June 2023) and Matters Arising (Action Log)**
The minutes of the previous meeting were approved subject to the correction of a typo on page 4.

Actions have been completed or are covered on the agenda under items 11 (DBV in SEND) and 15 (Working Groups).

8. **School Funding Formula 2024-25**
Schools Forum received a report providing information on the provisional allocations from the dedicated schools grant (DSG) funding for 2024/25, and proposing that the Westmorland and Furness school funding formula mirrors the national funding formula (NFF) as in previous years. The report recommends principles to apply in the event of either a shortfall or a balance remaining in the Schools Block funding after allocating funding on that basis, and after taking into account the Growth Fund budget. It is a requirement that all maintained schools and academies are consulted on any changes to the local funding formula each year, and the report includes draft consultation questions. Following this consultation, Schools Forum on 1 November will be asked to make a recommendation to Cabinet on a proposed approach. Cabinet will then decide

on the final school funding formula for 2024/25 which will impact maintained schools from 1 April 2024 and academies from 1 September 2024. The deadline for submission to ESFA is 22 January.

The DSG funding is allocated in four blocks: Schools, High Needs, Early Years and Central Schools Services. The Schools Block allocation consists of Core NFF, Premises factor and Growth Fund factor. The increase in the Core NFF includes the Mainstream Schools Additional Grant (MSAG).

It was noted that only mainstream schools are eligible for the new split site factor as it is part of the Schools Block, but within our special school funding formula there is a factor which allocates additional funding to Special schools operating on split sites.

It was noted that the DfE is moving towards a 'hard' NFF. Westmorland and Furness will be restricted to setting their 2024/25 factor values within +/-2.5% of the NFF as the values for 2023/24 were within 2.5% of the respective NFF values and were deemed to be mirroring the NFF.

In the High Needs Block Westmorland and Furness is estimated to gain £0.675m (2.43%) compared with 2023/24, subject to changes in pupil numbers and other later adjustments. In the Central Schools Services Block Westmorland and Furness is estimated to lose £0.088m (5.21%) compared to last year.

It was confirmed that if funding were available and used to support the High Needs Block, it would not impact on any of the investment and savings plans. The deficit sits within the council's overall cash balances and is managed centrally. DSG deficits are a significant issue for local authorities nationally.

The Schools Forum:

- noted the provisional school funding settlement;
- supported the recommendation to consult all schools on the proposal to apply the National Funding Formula in full in 2024/25;
- supported the recommendations to
 - a) reduce the basic per pupil funding factor values in the formula if there is a shortfall, after applying the National Funding Formula in full and taking into account the Growth Fund budget
 - b) transfer any remaining balance up to 0.5% to the HN Block and allocate any leftover balance thereafter, to schools by increasing basic per pupil funding factor values in the formula.
- supported the draft consultation documents at Appendix 2 and 3 which include three recommended questions.

9. **Early Years Funding Formula – DfE Consultation**

Schools Forum received a report outlining the DfE consultation and Westmorland and Furness' response relating to the government's proposal to extend early years free entitlements in stages starting from April 2024. The proposal would mean all working parents in England will be able to access 30 hours of free childcare per week for 38

weeks of the year from the term after their child turns 9 months old to when they start school.

Illustrative figures published by DfE show that the hourly funding rate for Westmorland & Furness is significantly below the average national rate, and is the third lowest nationally. It was discussed while labour costs are higher in other areas, additional costs such as transport for providers and workers in rural areas is not reflected. It was noted that fee paying places often subsidise funded places, and reducing fee paying places will impact on providers' budgets.

It was clarified that Inclusion funding supports children with SEN in private nurseries, while funding for Special Schools comes from the High Needs Block. It is not a statutory requirement to have early years places in Special Schools, though children with SEN have the same entitlement as other children to attend an early years setting and a Special School may be the most suitable setting for those with complex needs. If attending (specialist) early years provision has been specified in an EHCP, it becomes a statutory requirement at that point.

Costs are anticipated with the delivery of the new childcare offers and the Directorate Leadership Team have recommended to Schools Forum that some of the funding should be retained centrally. This would be used to support the roll out of the new arrangements.

It was noted that Schools Forum currently lacks Early Years representation. Consultation response rates are typically low, particularly where changes to previous years are small..

The Schools Forum noted:

- the extension of early years entitlements for 2-year olds and under and the changes to the local funding rules and the LA's response to the DfE's consultation;
- the Children's DLT recommendation that a portion of the new funding is centrally retained to support the rollout of the new free entitlements;
- the requirement to consult early years providers and maintained schools on the new local funding formula and timeline for doing this.

Action:

- **All Schools Forum members to encourage the schools they represent and others in their networks to take part in the forthcoming consultation on the Early Years Funding Formula.**

10. Homes for Ukraine Grant

Schools Forum considered a report that presented the grant funding and allocation to date from the Homes for Ukraine (HfU) visa scheme, and the proposal for allocation of the remaining balance. A total of £1.007m has been received relating to HfU children living in Westmorland and Furness. The actual spend to date has been £0.759m, and it was proposed to allocate the remaining balance of £0.248m should be spent by the deadline of 31 March 2024 by increasing each school's/early years providers existing HfU grant allocation by 32.6%.

It was noted that while some of the schools might not have HfU pupils currently, costs incurred previously would have exceeded the grant allocation received to date. Schools must evidence the costs incurred. It was clarified that the grant can only be used for schools that have had children arriving via the HfU scheme.

The Schools Forum:

- noted the balance remaining against the grant of £0.248m and;
- supported the proposed methodology for allocating the remaining balance to schools and early years providers by uplifting each school/early years provider's allocation by 32.6% as shown in the modelling at Appendix 1.

11. Projected Maintained Schools Balances & Excess Surplus Balances Outcome

Schools Forum considered a report that presented the Westmorland and Furness maintained schools projected net deficit balance position of £0.347m as at 31 March 2024.

The number of maintained schools in deficit is forecast to increase from 23 to 27. A number of schools are due to convert to academies which will have a further negative impact on the overall net deficit position. The 27 schools have been asked to submit a mandatory deficit recovery plan.

The projection does not include the impact of new Teachers Pay Additional Grant which is expected to be for Westmorland & Furness mainstream and Special/PRUs schools £0.900m. This would lead to a revised projected net balance as at 31 March 2024 of £0.553m (surplus).

Deficits are predicted to increase. Finance staff have limited capacity and direct schools to online tools. The government has announced that nationally £40m will be available to support maintained schools in financial difficulty, though details of how this funding will be targeted has not yet been published.

25 schools that ended the financial year 2022/23 with an excess over the threshold of 8% (primary, nursery and special schools) and 5% (secondary schools) were asked to justify their balances. The total value of the excess amount was £0.996m. The majority of justifications met the criteria in the policy and 19 schools have received approval to retain their excess balance, there was one partial clawback of £1,125 and 5 schools have received conditional approval subject to providing further evidence by 30 September.

Schools Forum discussed whether the Excess Surplus Balance Policy should continue, given that schools could usually justify their surplus. Staff time might be better spent supporting schools to reduce deficits or avoid falling into deficit. Suggestions included raising the percentage thresholds so that smaller numbers of schools with the largest surpluses would be reviewed. It was raised that 'no-fault' deficits should be recognised, particularly where small schools had few options to adjust staffing and associated costs. Training around school finances would be beneficial.

Support the principle but want to explore ways to make it more efficient by changing the percentage, or ways to support rigour of financial forecasts before schools gets to the deficit position.

The maintained schools' Schools Forum representative members:

- noted the maintained schools' balances projected net deficit position for 2023/24 of £0.347m;
- noted the outcome of the excess surplus balances policy;
and
- supported the transfer of partial claw back of £1,125 to the Schools Contingency fund;

The principle of claw back was supported but forum members would like to review options to make the process more efficient and less time consuming for finance staff, and to provide support to schools to avoid reaching a deficit position.

Action:

- **Amanda Chew to consider options for the Excess Surplus Balance Policy, to be revisited at a future meeting. (JH/AC - Add to Forward Plan)**

12. Input to School Teachers Review Body visit to Cumberland (9-10 Nov 2023)

It was noted that members of the School Teachers' Review Body will be meeting with Cumberland Head Teachers and LA finance/education leaders to talk through the impact of pay reviews. There is an opportunity for Westmorland and Furness to feed in our unique perspective, challenges and context to the review.

Action:

- **Clerk to email Schools Forum members a request for input on the STRB visit that can be forwarded to colleagues, and collate responses to feed back to Cumberland.**

13. Delivering Better Value for SEND

55 local authorities are part of the DfE Delivering Better Value for SEND programme which aims to slow the rate of increase in deficit budgets. Grant funding was approved in February 2023 and Cumberland and Westmorland and Furness were each awarded £1m to support the work.

The first area of focus is increasing inclusivity in mainstream schools. A sharp increase in EHCP numbers has put significant pressure on the High Needs Block and Westmorland and Furness figures have increased to above the national average in 2-3 years.

The work on developing a high needs provision strategy is underway. Following a competitive tender process we have appointed 1st Planner to review current

provision, identify gaps and develop a 7 year strategy. It is intended that this will reduce the need to commission places for children and young people in high cost independent specialist schools by providing greater capacity locally. Phase one of this work will be completed by the end of this year.

We recognise that this will only be successful if staff working in our local schools and education settings are supported to identify and meet the needs of children and young with complex SEND and we are working with headteachers to develop our action plan to develop consistent, high quality inclusive practice. We have employed a SEND Consultant to support this development work to move forward at pace.

While there is no specific statutory responsibility to fund early years places for children with SEND, these children have the same entitlement as other children to attend an early years/nursery setting. If they have an EHCP then the provision written into Section F must be provided as the EHCP is a legal document. For those children with highly complex needs, specialist provision may be the most suitable option. With this in mind, the local authority needs to consider at what point EHCP assessments should take place and whether there is a need to develop specialist education provision for children who are not yet of compulsory school age.

Action:

- **DBV in SEND updated to be scheduled for next meeting on 1 November.**

14. Consideration of Forum Member vacancies

Vacancies were noted. Cathy Styles has retired leaving a vacancy in the Maintained Primary sector.

Action:

- **All Schools Forum members to approach at least one colleague who meets the criteria to fill vacancies.**

15. Working Groups

Action:

- **Working Groups to be a standing agenda item to consider whether any need has arisen.**

16. Dates of Future Meetings and Forward Plan

- i. Members noted the training session on the Funding Formula scheduled for Tuesday 17 October 2023 starting at 9.30am in South Lakeland House, Kendal.
- ii. Members noted that the next meeting of the Schools Forum will be held on Wednesday 1 November 2023 starting at 9.30am via Microsoft Teams.

Action:

- **Clerk to circulate dates for Summer term 2024 and 2024/25 academic year.**

iii. Westmorland and Furness Schools Forum Forward Plan 2023-24

Action:

- **Officers to discuss a possible Forward Plan item – a briefing on the potential impact of and opportunities arising from Team Barrow developments.**

There were no other items of business.

Children's Services/CS
Sep 2023



Schools Forum – Action Log

Meeting date	Agenda item	Ongoing Actions	Owner	Due date	Update for next meeting

(See table below for completed items)

Meeting date	Agenda item	Completed Action	Owner	Due date	Update for next meeting
14/06/23	6	Christina to arrange and circulate potential dates to be used for working groups / training / task and finish work to start following the 20 September meeting.	Christina Summerfield	20/09/23	Funding formula training scheduled for 17/10/23. Working groups on agenda for 20/09/23
14/06/23	7	Matt Hardwick will raise a query with Amanda Chew over whether this document [regarding land assets] covers long term leasing.	Matt Hardwick	20/09/23	Issue resolved and closed.
14/06/23	10	Amanda to check revised [Maintained Schools Balances Outturn 22-23] papers carry correct percentages in para. 4.11: 8% (primary) and 5% (secondary).	Amanda Chew	20/09/23	Corrected paper uploaded to webpage.
14/06/23	11	Susan Milburn will discuss with Trudy whether input from the Schools Forum on DBV in SEND would be useful, and confirm.	Susan Milburn	20/09/23	Update to be presented in item 11.

WESTMORLAND & FURNESS COUNCIL SCHOOLS FORUM
Report Title: School Funding Formula 2024/25 – Consultation Outcome
Meeting date: 1 November 2023
Report of: Mil Vasic, Director Children’s Services

1.0 Executive Summary

- 1.1 This paper presents the outcome of the Schools Forum consultation with all Westmorland & Furness schools and academies on the school funding formula for 2024/25.
- 1.2 On 17 July 2023 the Education & Skills Funding Agency (ESFA) announced details of the Dedicated Schools Grant (DSG) funding arrangements for 2024/25. These figures were amended on 6 October 2023 following the discovery of an error by ESFA relating to pupil numbers and affordability of the National Funding Formula (NFF). Following the update to the indicative funding figures published by the ESFA in October the information included in the consultation was updated and the consultation was extended slightly.
- 1.3 The Westmorland & Furness Schools Forum is asked to review the results of the consultation and make a recommendation to Cabinet on the formula that should be used in 2024/25 to allocate funding to schools and academies and the principles to apply if there is a shortfall or a balance remaining in the Schools Block after calculating the school budget shares.

2.0 Link to Council Plan Priorities

- 2.1 Ensuring that schools are appropriately funded is supportive of the Council Plan priorities that “People in Westmorland and Furness are healthy, happy, active and able to lead fulfilling independent lives, thriving in their communities” and the commitment to reduce inequality and “ensure that young people have enough opportunities to access the best education”.

3.0 Recommendation

- 3.1 Based on the consultation responses the Schools Forum is recommended to support Option 1 that:

- The NFF is implemented in Westmorland & Furness in full in 2024/25, impacting maintained schools from April 2024 and academies from September 2024 and;
- After taking into account the growth fund budget, any residual balance up to a maximum of 0.5% to be transferred from the Schools Block into the High Needs Block and;
- Any balance remaining in the Schools block after transfer of a maximum of 0.5% to be allocated to schools through the school funding formula and;
- If the NFF is not affordable, the basic per pupil factor values in the formula will be reduced.

4.0 Rationale and Evidence for the Recommendation

Background

- 4.1 A national funding formula was introduced for schools from 2018/19 and since then local authorities have been able to decide in consultation with their schools and Schools Forum whether to use the NFF to allocate funding to schools or to apply a locally determined schools funding formula, within some restrictive parameters set by the ESFA. In 2023/24 the DfE began the first year of transition towards a direct NFF whereby all schools (including academies) will be funded using one single NFF and placed further restrictions on local flexibility.
- 4.2 In 2023/24 the Cabinet members for Cumbria decided that the NFF would be used to allocate funding to schools and academies in Westmorland & Furness, as in previous years since the introduction of the NFF in 2018/19. When the final DSG Schools Block allocation for Westmorland & Furness was published by the ESFA in December 2022 and after applying the NFF in full and taking into account the Growth Fund budget of £0.221m there was an affordability gap of £0.179m resulting in a small reduction in the basic per pupil funding factor compared to the NFF value of -0.21%. As there was no balance remaining in the Schools Block after applying the funding formula on this basis there was no transfer to the High Needs Block to support the budget pressures in 2023/24.
- 4.3 On 17 July 2023 the ESFA announced details of the DSG funding arrangements for 2024/25. These were presented to Schools Forum at its meeting on 20 September 2023 who agreed with the local authorities recommendation to consult all Westmorland & Furness mainstream schools and academies on adopting the NFF in 2024/25 and to seek views on the principles to be applied if there is a shortfall or balance remaining in the Schools Block after allocating the funding on this basis, namely:
- if there a shortfall reduce the basic per pupil factor values;

- If there is a balance remaining transfer up to 0.5% to the High Needs Block and allocate any leftover balance thereafter, to schools by increasing basic per pupil funding factor values in the formula.
- 4.4 The consultation opened on 27 September for a period of 3 weeks. However, subsequent to this, the ESFA announced on 6 October that it had made an error relating to pupils numbers and affordability of the NFF and published revised provisional Schools Block DSG allocations for local authorities. The impact of the ESFA error was a reduction in the NFF factor values which were originally to increase by 2.4% after taking into account the roll in of the Mainstream Schools Additional Grant but the increase has now reduced to 1.4%.
- 4.5 The figures in the Schools Forum consultation with Westmorland & Furness schools and academies were revised and the deadline for responding was extended to Friday 20 October 2023, a copy of the revised consultation document is at Appendix 1 and the revised illustrative impact on schools is at Appendix 2.

Consultation Outcomes

- 4.6 In total 14 schools responded to the consultation with 11 (79%) agreeing with the Schools Forum recommendation that the NFF should be used to allocate funding to schools in 2024/25. A total of 10 (71%) agreed that if there was a shortfall in the Schools Block the basic per pupil factor values in the formula should be reduced. A total of 11 (79%) respondents agreed that a transfer from the Schools Block to the High Needs Block should be actioned if there is a balance remaining in the Schools Block.
- 4.7 A summary of the results and comments made by respondents are at Appendix 3. Although the number of schools responding to the consultation is low there is clear support for the proposals. Therefore, the Schools Forum is asked to consider the outcome of the consultation and recommend to Cabinet one of the below options.
- 4.8 The final decision on the school funding formula for 2024/25 will be made by Cabinet at its meeting on 12 December 2023.

5.0 Options

- 5.1 Schools Forum can:

Option 1

- Recommend that the NFF is implemented in Westmorland & Furness in full in 2024/25, impacting maintained schools from April 2024 and academies from September 2024 and;

- After taking into account the growth fund budget, any residual balance up to a maximum of 0.5% to be transferred from the Schools Block into the High Needs Block and;
- Any balance remaining in the Schools block after transfer of a maximum of 0.5% to be allocated to schools through the school funding formula and;
- If the NFF is not affordable, the basic per pupil factor values in the formula will be reduced.

Or:

Option 2

- Recommend that the NFF is implemented in Westmorland & Furness in full in 2024/25, impacting maintained schools from April 2024 and academies from September 2024 and;
 - Any balance remaining in the Schools block after taking into account the growth fund to be allocated through the school funding formula and;
 - If the NFF is not affordable, the basic per pupil factor values in the formula will be reduced.

5.2 It should be noted if Schools Forum recommend Option 2 there is a risk that, due to the requirement that local authorities to move their local formula closer to the NFF, 'topping up' the NFF factor values by allocating additional funding through the formula will create greater turbulence for some schools in future years. It may also make applying the NFF in full unaffordable in future years as the additional funding would be built into the schools budget share baselines, but the funding for this is not reflected in the notional school budgets used by the ESFA to calculate local authority level core NFF funding.

6.0 Financial and Other Relevant Implications

6.1 Resource and value for money implications are considered throughout this report. No equality/legal/ implications have been identified.

25 October 2023

Appendices:

1. Westmorland and Furness School Funding Formula 2024/25 - Consultation Document
2. Westmorland and Furness School Funding Formula 2024/25 - Illustrative Impact of 2024/25 National Funding Formula

3. Westmorland and Furness Schools Funding Formula 2024/25 – Consultation Responses

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School Funding Formula for 2024/25 Consultation

**Consultation between Westmorland & Furness Schools Forum and
Maintained Schools & Academies within Westmorland & Furness**

Consultation Commences: Wednesday 27 September 2023

Deadline for responding to the [consultation](#): Friday 20 October 2023

Introduction

National Funding Formula

1. A national funding formula (NFF) was introduced for schools from 2018/19 and as in previous years, in 2024/25 local authorities will continue to decide, following consultation with their schools and Schools Forum, whether this formula is applied or a locally determined formula is used.
2. This document comprises a consultation with all Westmorland & Furness mainstream schools/academies and Schools Forum to seek views on the proposed changes to the schools funding formula in 2024/25. The consultation also considers some of the continuing challenges around high needs budget.
3. All schools are encouraged to respond to this consultation using the [online survey](#). The deadline for responding to the consultation is 20 October 2023. The outcome of the consultation will be reported to Schools Forum at their next meeting on 1 November who will, after taking into consideration the consultation results, make a recommendation to Cabinet members who will decide on the final shape of the school funding formula for 2024/25 in December 2023.
4. Schools can find further detailed information on the national funding formula at: [National funding formula for schools and high needs - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

Shape of the National Funding Formula in 2024/25

5. In July 2023 the government announced that in 2024/25 the schools and high needs block funding would rise by £1.8bn nationally compared to 2023/24. Of this, £440m is being directed to the High Needs Block to support children and young people with special educational needs.
6. Local authorities will continue to have flexibility to set a local school funding formula in 2024/25 however the government continues to be committed to moving towards a 'hard' NFF whereby individual school budgets will be set directly by the ESFA rather than independently through a locally agreed funding formula. In 2023/24 local authorities were required to bring their own formulae at least 10% closer to the direct NFF. Local authorities whose factor values were within +/- 2.5% of the respective NFF values in 2023/24 are deemed to be mirroring the NFF and will only be allowed to set their 2024/25 local factor values between +/-2.5% of the NFF. This restriction is being applied again in 2024/25.
7. Changes in the 2024/25 NFF include the roll in of the Mainstream Schools Additional Grant (MSAG) of which £4,510 has been added to each school's lump sum factor and the remainder has been allocated on a per pupil basis as follows:

	£
Primary AWPU	119
KS3 AWPU	168
KS4 AWPU	190
Primary Minimum Per Pupil Funding	143
Secondary Minimum Per Pupil Funding	195
Primary FSM6	104
Secondary FSM6	152

8. On top of these increases, the basic per pupil funding factor, additional needs factors and the school lump sum have increased by 1.4%. The free school meals (FSM) factor will increase by 1.6% and the FSM6 factor has increased by 1.4%. The minimum per pupil funding levels (MPL) have been set at £4,610 per primary and £5,995 per secondary pupil.
9. A new split sites factor which targets extra funding to schools which operate across more than once site has been introduced into the NFF which must be used by local authorities in their local school funding formula. It comprises of a lump sum of £53,700 and for those schools whose sites are separated by more than 100 meters receive distance funding on a sliding scale up to a maximum of £26,900 for sites which are at least 500 metres away from the main site.
10. The settlement also allows for an increase to the funding floor so that all schools and academies will attract at least 0.5% per pupil gain against their 2023/24 per pupil baselines which have been adjusted to include the MSAG. Local authorities will continue to be allowed to set a minimum funding guarantee (MFG) in local formulae, which must be between +0% and +0.5%.
11. As in previous years, local authorities are allowed, with the agreement of their Schools Forum, to transfer up to 0.5% of the School Block funding to support the High Needs Block budget.
12. The below table shows a comparison between the formula factors applied in Westmorland & Furness in 2023/24 and the NFF in 2024/25:

sf 011123 School Funding Formula 2024-25 Consultation Outcome – Appendix 1

	2023-24	2024-25	Increase
	Unit Value	Unit Value	%
Basic per Pupil Funding			
Primary AWPU	£3,387	£3,562	5.17%
KS3 AWPU	£4,775	£5,022	5.17%
KS4 AWPU	£5,381	£5,661	5.20%
Primary Minimum Per Pupil Funding	£4,405	£4,610	4.65%
Secondary Minimum Per Pupil Funding	£5,715	£5,995	4.90%
Deprivation			
Primary FSM	£480	£490	2.08%
Secondary FSM	£480	£490	2.08%
Primary FSM6	£705	£820	16.31%
Secondary FSM6	£1,030	£1,200	16.50%
Primary IDACI A	£670	£680	1.49%
Primary IDACI B	£510	£515	0.98%
Primary IDACI C	£480	£485	1.04%
Primary IDACI D	£440	£445	1.14%
Primary IDACI E	£280	£285	1.79%
Primary IDACI F	£230	£235	2.17%
Secondary IDACI A	£930	£945	1.61%
Secondary IDACI B	£730	£740	1.37%
Secondary IDACI C	£680	£690	1.47%
Secondary IDACI D	£620	£630	1.61%
Secondary IDACI E	£445	£450	1.12%
Secondary IDACI F	£335	£340	1.49%
Low Prior Attainment			
Primary LPA	£1,155	£1,170	1.30%
Secondary LPA	£1,750	£1,775	1.43%
English as an Additional Language			
Primary EAL	£580	£590	1.72%
Secondary EAL	£1,565	£1,585	1.28%
Mobility			
Primary mobility	£945	£960	1.59%
Secondary mobility	£1,360	£1,380	1.47%
School Led Funding			
Lump Sum	£128,000	£134,400	5.00%
Primary Sparsity (Up to a maximum of)	£56,300	£57,100	1.42%
Secondary Sparsity (Up to a maximum of)	£81,900	£83,000	1.34%
New Split Site Factor (Up to a maximum of)	n/a	£80,600	
Rates & Rents	Actual cost	Actual cost	

Westmorland & Furness Schools Funding Formula in 2023/24

13. Following consultation with schools and Cumbria Schools Forum the school budget shares were calculated using the NFF in 2023/24 and it was recommended by Schools Forum and agreed by Cabinet members that if there was a leftover balance remaining after allocating the school budgets on this basis that up to 0.5% would transfer to the High Needs Block. When the DfE confirmed the final Schools Block funding for 2023/24 in December 2022, the school funding formula was calculated on the basis agreed and there was an affordability gap of £0.179m resulting in a small reduction in the basic per pupil funding factor compared to the NFF of -0.21%. As there was no balance remaining in the Schools Block after applying the funding formula on this basis there was no transfer to the High Needs Block to support the budget pressures in 2023/24.

Westmorland & Furness Proposed School Funding Formula 2024/25

14. The DfE have published notional 2024/25 budgets for each school based on the NFF using 2023/24 pupil data and characteristics. The notional budgets are available at: [National funding formula tables for schools and high needs: 2024 to 2025 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/national-funding-formula-tables-for-schools-and-high-needs-2024-to-2025).
15. The notional budgets, which are based on October 2022 pupil numbers and pupil characteristics, are then used by the ESFA to determine the actual primary and secondary per pupil funding units used to calculate the local authority level allocations for 2024/25. The ESFA calculate these units of funding by separately dividing each local authority's total primary and secondary funding through the NFF by its total primary and secondary pupil numbers. These units of funding form the core NFF funding and together with funding for Premises which is based on 2023/24 costs and Growth funding which also now includes funding for falling rolls comprise the total Schools Block allocation for 2024/25. The DfE have published the provisional Schools Block allocation for Westmorland & Furness which is compared to 2023/24 in the table below:

	23/24	24/25	Movement
	£m	£m	£m
Core NFF	152.865	161.251	8.386
Premises factor	1.924	2.148	0.225
Growth Fund factor	0.720	tbc	tbc
Total	155.509	163.400	8.611

16. The actual 2024/25 school funding formula allocations will be based on October 2023 pupil numbers and pupil characteristics. The Westmorland & Furness Schools Forum recommends that the NFF is used as the basis for allocating funding to schools in 2024/25 and that if, after applying the formula on this basis and taking into account any budget required to support growth needs there is

shortfall or balance remaining in the Schools Block funding then it is proposed that the following principles are applied:

- if there is shortfall reduce the basic per pupil funding factor values in the formula;
 - if there is a remaining balance transfer up to 0.5% to the HN Block and allocate any leftover balance after that, if available, to schools by increasing basic per pupil funding factor values in the formula.
17. This would continue be the most prudent method of allocating the school budget shares in 2024/25 given that it is known that the government are moving forward with their plans to transition to a 'hard' formula in future years and that the majority of local authorities have either adopted the NFF or moved their own local formulae closer towards the NFF in preparation for this change. It will also provide schools with the full funding due to them under the NFF, subject to affordability.
 18. A shortfall or balance remaining in the Schools Block funding can arise after allocating the funding to schools using the NFF due to the way local authorities are funded as detailed in paragraph 15. The actual primary and secondary units of funding at local authority level are based on October 2022 pupil data and changes in pupil characteristics such as eligibility for FSM or changes in attainment levels are not reflected in the primary and secondary units of funding used to allocate the core NFF funding to local authorities in 2024/25. It is anticipated that the number of children eligible for FSM will have increased between the October 2022 and 2023 census dates and therefore this could mean that applying the NFF in full will be unaffordable in 2024/25 as it was in 2023/24.
 19. The Premises factor at local authority level, which is based on the previous year's actual spend in their 2023/24 school funding formula will also have an impact on affordability as 2024/25 school funding formula will be based on estimated premises costs for 2024/25.
 20. The local authority level Growth Fund which, from 2024/25 also includes funding for falling rolls, is not ring-fenced and local authorities can decide on the level of growth/falling rolls budgets needed locally in consultation with Schools Forum. Historically, since the introduction of the NFF Cumbria has had Growth fund to support schools who have exceeded their PAN on the request of the local authority and this can also impact on the level of funding available to allocate through the school funding formula.
 21. The alternative option would be not to transfer any leftover Schools Block funding to the HN Block but to allocate it, after applying the NFF, to schools through the school funding formula by 'topping up' the AWPU factor values but due to the new restrictions being imposed by government from 2023/24 any increases would be limited to +2.5%. However, it is not yet known how much funding will be available (if any) after applying the NFF as the final Schools Block funding, which will be based on the October 2023 census data, will not be made available until December 2023. Therefore, it is not possible to model the impact of this on individual school budgets with any degree of accuracy.

22. If any leftover Schools Block funding were to be allocated to schools through the schools funding formula by increasing the AWPU factor values above the level of the NFF values, not all schools would see an increase in their budget shares. This is because some schools receive protection through the MPL and MFG factors and therefore, unless the increase in APWU takes them over these levels of protection then they will see no change to their budget shares.
23. There is also a risk that, due to the proposal requiring local authorities to move their local formula closer to the NFF from 2024/25 onwards, 'topping up' the NFF factor values by allocating additional funding through the formula would create turbulence for some schools, although they would receive protection against year-on-year reductions through the MFG.
24. Appendix 1 to this consultation presents a comparison between the actual Westmorland & Furness school funding formula in 2023/24 against the proposed school funding formula for 2024/25. This mirrors the national funding formula as applied by the DfE and includes the mandatory MPL of £4,610 per primary and £5,995 per secondary pupil and a MFG of +0.5% per pupil increase against 2023/24 baselines.
25. The school level allocations do not exactly replicate the notional school budget shares as published by the DfE for all schools because the DfE have used the notional NFF baselines for 2023/24 to calculate the MFG for 2024/25 rather than the actual baselines for 2023/24 as submitted to the DfE through the Authority Proforma Tool (APT).
26. It is also important to note that the notional budgets published by the DfE are not reflective of actual amounts receivable by schools in 2024/25 as the local authority continues to have flexibility to set a locally agreed funding formula through consultation with schools and Schools Forum and it must also ensure that the final formula is affordable and does not exceed the School Block funding available.
27. The proposed school funding formula for 2024/25 will impact on maintained schools with effect from 1 April 2024 and for academies from 1 September 2024.
28. To enable a like for like comparison the illustrative 2024/25 school funding formula has been based on the same pupil numbers and pupil characteristic data as that used to calculate the actual 2023/24 school funding formula. The 2023/24 baseline school budget shares used to calculate the MFG have been adjusted to include the MSAG.
29. Final allocations for 2024/25 will be based on the December 2023 dataset which will use October 2023 census pupil data.
30. It should be noted that the actual school funding formula figures for 2023/24 and illustrative school funding formula figures for 2024/25 in Appendix 1 are shown before de-delegation has been deducted from maintained schools budgets and include premises factors (rates and rents) which have been based on 2023/24 actual levels for both maintained and academy schools as applied in the APT submitted to the DfE.

Consultation Question 1:

Do you agree with your Schools Forum recommendation that the National Funding Formula continues to be used to allocate funding to schools in 2024/25?

31. As recommended by your Schools Forum, if applying the national funding formula creates an affordability gap within the School Block it is proposed that the basic per pupil funding factor values are reduced down proportionately to a level that it is affordable. It should be noted that if this situation were to arise not all schools would see a reduction in their budget shares. This is because some schools receive protection funding through the MPL and MFG factors and are protected against losses through these factors.

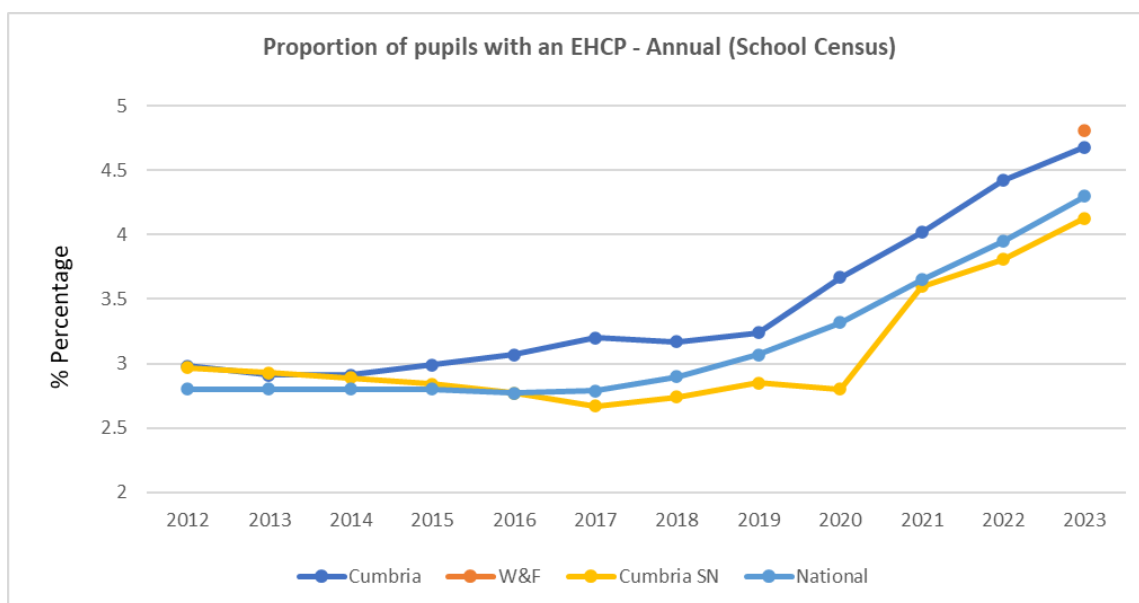
Consultation Question 2:

Do you agree with your Schools Forum recommendation that if there is a shortfall in Schools Block funding after applying the National Funding Formula that this is managed by reducing the basic per pupil funding factor values in the formula?

High Needs Funding

32. As previously published in last year's school funding formula consultation, schools will be aware, like many other local authorities, that Westmorland & Furness is experiencing significant budget challenges in relation to funding high needs provision.
33. The DfE requires all local authorities with a cumulative Dedicated Schools Grant (DSG) deficit to set out their plans to bring the reserves back to a balanced position. Following disaggregation the opening balance on the DSG reserves as at 1 April 2023 for Westmorland & Furness was a net deficit of £8.741m. The main pressure on the DSG reserves was the deficit on the HN Block of £12.017m this was offset by a surplus on other DSG blocks of (£3.276m). This figure does not include school balances which are reported on separately.

34. The deficit on the High Needs budget continues to relate to specific pressures relating to the growth in demand for Education Health Care Plans (EHCPs) for pupils with SEN which is directly linked to the SEND reforms of 2014, since which there has been a steep increase in the cumulative numbers of pupils with EHCPs over the last 7 years, which reflects the national picture with many other local authorities also experiencing significant pressure against the High Needs budget.
35. The benchmarking chart below shows that Westmorland & Furness' percentage of pupils with EHCPs is higher compared to the national and Cumbria statistical neighbours rates although the rate of increase for Cumbria overall is largely matched by the rate of increase both nationally and against the Cumbria statistical neighbours.



36. In July 2023 the DfE announced the provisional HN block funding allocation for 2024/25. This included a minimum increase per head of 2 to 18 year old population of 3% capped at 5% however this protection only applies to specific factors in the funding formula. For Westmorland & Furness the overall provisional increase in HN Block funding is estimated to be £0.675m (2.43% increase) compared to 2023/24 subject to changes in pupil numbers and other later adjustments.
37. Regular budget monitoring reports on the High Needs Block budget and progress against the deficit recovery plan are discussed at Schools Forum meetings. The minutes and reports are available to download from the [Schools Forum](#) page on the Westmorland & Furness website. However, despite the impact of a number of invest to save initiatives including early intervention initiatives, school based alternative provision programmes and expansion of special school places all of which over time are expected to reduce reliance on expensive independent providers and improve outcomes for children and young people with SEND, there is still a significant gap between funding available and forecast expenditure in 2023/24.

38. Westmorland & Furness is being supported by the DfE's Delivering Better Value for SEND programme the aim of which is to achieve a balanced in-year position on the High Needs Block and has successfully bid and received a £1m grant to support its improvement plans the outcomes of which will be incorporated into a new Westmorland & Furness DSG management plan in due course, however, the impact will not be achieved in the first year of the programme.
39. The funding regulations for 2023/24 allow a transfer of a maximum of 0.5% from the Schools Block to the High Needs Block with Schools Forum approval. Your Schools Forum recommends that after applying the NFF to calculate school budget shares, if there is any balance leftover it is transferred to the High Needs Block to support the budget pressures, capped at 0.5%. Any residual balance after transferring up to 0.5% to the High Needs Block would be allocated through the funding formula by increasing the basic per pupil unit factor value, subject to a maximum of +2.5% as detailed in paragraph 6 above.
40. It is not possible to confirm the actual value of the transfer to High Needs Block, if any, until the DfE publish the final data set to be used to calculate the school budget shares in December 2023 which takes into account the October 2023 census pupil data and characteristics. However it is estimated that up to 0.5% would equate to a maximum of £0.821m.

Consultation Question 3:

Do you agree that, if there is any School Block funding remaining (up to a maximum of 0.5%) after allocating the school funding formula to schools using the NFF, it should be transferred to the High Needs Block?

Areas not impacted by this Consultation

41. It should be noted that the following funding streams are not impacted by this consultation:
 - Early Years Funding
 - Special School and Pupil Referral Units
 - Post 16 Education
 - Other government grants including Pupil Premium, Universal Infant Free School Meals, Primary Sport & PE grant.

Responding to the Consultation

24. Schools are invited to respond to the 3 questions in this consultation using the [online survey](#) by **Friday 20 October 2023**. Returns submitted after this date will not be included.
25. We encourage every school to respond. We kindly ask that there is only one response per school.

Appendix:

- 1) Illustrative Impact of National Funding Formula 2024/25

AGENDA ITEM 7

sf 011123 School Funding Formula 2024-25 Consultation Outcome – Appendix 2

Westmorland & Furness Consultation on School Funding Formula 2024/25 - Illustrative Impact of the 2024/25 National Funding Formula v2

LAESTAB	School Name	2023-24 Pupil numbers used as per APT submission. *(Note for some academies this may differ from the GAG data)	2023-24 Actual NFF Allocations per APT submission before de-delegation (maintained schools) and including premises factors *(For academies this will differ from the GAG data)	Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant	2024-25 Indicative NFF allocations using 2023-24 pupil numbers and data after Minimum Funding Guarantee and before de-delegation (maintained schools) including premises factors	Increase	Year on Year change
(a)	(b)	(c)	(d)	(e)	(f) [(g) + (e)]	(g)	(h) [(g) - (f)]	(i) [(g)/(f)-1]
		27,197	155,288,320	5,165,311	160,453,630	162,899,454	2,445,824	
9432000	St Martin & St Mary Church of England Primary School	330	1,465,751	£47,316.00	£1,513,066.79	£1,527,686.80	£14,620.01	0.97%
9432002	Cambridge Primary School	166	976,459	£35,184.00	£1,011,642.89	£1,026,942.51	£15,299.62	1.51%
9432003	Ambleside CoFE Primary School	77	487,205	£14,297.00	£501,502.26	£509,095.57	£7,593.31	1.51%
9432004	Alston Primary School	102	575,489	£18,832.00	£594,321.24	£603,443.36	£9,122.12	1.53%
9432005	Armathwaite School	65	427,794	£12,973.00	£440,767.48	£447,482.80	£6,715.31	1.52%
9432017	Tebay Primary School	48	388,823	£12,198.00	£401,021.15	£407,058.08	£6,036.93	1.51%
9432018	Yanwath Primary School	123	607,493	£19,875.00	£627,367.79	£637,043.51	£9,675.72	1.54%
9432028	Greystoke Primary School	39	346,490	£9,255.00	£355,745.21	£356,552.64	£807.43	0.23%
9432040	Nenthead Primary School	19	264,408	£6,979.00	£271,387.09	£275,344.40	£3,957.31	1.46%
9432045	Brunswick School	129	697,176	£23,709.00	£720,885.50	£731,925.63	£11,040.13	1.53%
9432046	North Lakes School	196	971,629	£32,930.00	£1,004,558.84	£1,019,952.20	£15,393.36	1.53%
9432054	Plumpton School	88	518,095	£15,918.00	£534,013.04	£542,045.68	£8,032.63	1.50%
9432058	Skelton School	70	440,879	£13,152.00	£454,030.91	£460,873.54	£6,842.63	1.51%
9432301	Bolton Primary School	66	439,178	£13,716.00	£452,893.67	£459,705.20	£6,811.53	1.50%
9432302	Brough Community Primary School	81	508,867	£16,229.00	£525,095.73	£533,024.60	£7,928.87	1.51%
9432305	Clifton Primary School	70	461,644	£13,672.00	£475,316.42	£482,445.46	£7,129.04	1.50%
9432308	Holme Primary School	117	618,750	£19,785.00	£638,534.79	£648,230.39	£9,695.60	1.52%
9432310	Kirkby Stephen Primary School	211	954,442	£33,779.00	£988,221.26	£1,003,468.06	£15,246.80	1.54%
9432311	Kirkby Thore School	30	315,581	£9,016.00	£324,596.61	£329,339.69	£4,743.08	1.46%
9432313	Long Marton School	81	513,138	£14,877.00	£528,014.79	£535,922.02	£7,907.24	1.50%
9432314	Milburn School	9	221,297	£5,893.00	£227,189.63	£230,455.41	£3,265.78	1.44%
9432315	Milnthorpe Primary School	155	739,566	£24,723.00	£764,288.71	£775,956.37	£11,667.66	1.53%
9432318	Ghyllside Primary School	415	1,833,349	£61,903.00	£1,895,251.60	£1,918,423.60	£23,172.00	1.22%
9432319	Stramontate Primary School	287	1,306,903	£45,007.00	£1,351,910.34	£1,373,047.34	£21,137.00	1.56%
9432320	Castle Park School	294	1,299,320	£42,512.00	£1,341,831.60	£1,359,589.60	£17,758.00	1.32%
9432321	Heron Hill Primary School	373	1,679,636	£53,161.00	£1,732,797.00	£1,756,101.00	£23,304.00	1.34%
9432322	Goodly Dale Primary School	85	481,015	£15,769.00	£496,784.26	£504,263.25	£7,478.99	1.51%
9432403	Chapel Street Infants and Nursery School	78	475,773	£16,392.00	£492,164.77	£499,588.91	£7,424.14	1.51%
9432404	Lindal and Marton Primary School	56	344,087	£11,382.00	£355,468.53	£360,814.64	£5,346.11	1.50%
9432406	Newton Village Academy	71	419,616	£13,999.00	£433,615.44	£440,178.25	£6,562.81	1.51%
9432407	Hawkhead Esthwaite Primary School	46	352,088	£9,984.00	£362,072.19	£367,502.82	£5,430.63	1.50%
9432413	Croftlands Infant School	113	577,065	£18,581.00	£595,645.68	£604,537.29	£8,891.61	1.49%
9432414	Croftlands Junior School	138	677,491	£23,844.00	£701,335.20	£712,082.82	£10,747.63	1.53%
9432502	Brisbane Park Infant School	105	640,634	£22,205.00	£662,839.27	£672,836.66	£9,997.39	1.51%
9432507	Victoria Academy	200	932,641	£31,638.00	£964,278.58	£968,411.59	£4,133.01	0.43%
9432508	Parkside Academy	221	1,125,902	£41,001.00	£1,166,903.20	£1,185,032.22	£18,129.02	1.55%
9432509	Greengate Junior School	160	939,527	£32,910.00	£972,437.27	£987,084.14	£14,646.87	1.51%
9432511	Roose School	200	927,314	£31,534.00	£958,847.60	£973,553.13	£14,705.53	1.53%

Calculation of Minimum Funding Guarantee			
2024-25 Lump sum, sparsity and premises factors to be excluded from the MFG Baseline	2023-24 Post MFG per pupil	2024-25 Post MFG per pupil	MFG % change
(j)	(k) [(f)-(i) / (c)]	(l) [(g)-(i) / (c)]	(m) [(l)/(k)-1]
24,152,055			
£140,786.80	£4,158.42	£4,202.73	1.07%
£153,095.70	£5,171.97	£5,264.14	1.78%
£192,587.07	£4,011.89	£4,110.50	2.46%
£170,840.32	£4,151.77	£4,241.21	2.15%
£190,132.40	£3,855.92	£3,959.24	2.68%
£192,237.28	£4,349.66	£4,475.43	2.89%
£157,595.77	£3,819.28	£3,897.95	2.06%
£194,259.50	£4,140.66	£4,161.36	0.50%
£193,105.80	£4,120.07	£4,328.35	5.06%
£146,449.00	£4,453.00	£4,538.58	1.92%
£150,708.50	£4,356.38	£4,434.92	1.80%
£190,796.72	£3,900.19	£3,991.47	2.34%
£196,451.00	£3,679.71	£3,777.46	2.66%
£196,417.20	£3,886.01	£3,989.21	2.66%
£193,122.17	£4,098.44	£4,196.33	2.39%
£196,518.00	£3,982.83	£4,084.68	2.56%
£168,562.82	£4,016.85	£4,099.72	2.06%
£149,579.75	£3,974.60	£4,046.86	1.82%
£197,270.50	£4,244.20	£4,402.31	3.73%
£194,102.17	£4,122.38	£4,220.00	2.37%
£193,130.75	£3,784.32	£4,147.18	9.59%
£148,450.00	£3,973.15	£4,048.43	1.89%
£139,673.60	£4,230.31	£4,286.14	1.32%
£140,288.00	£4,221.68	£4,295.33	1.74%
£138,649.60	£4,092.46	£4,152.86	1.48%
£170,971.00	£4,187.20	£4,249.68	1.49%
£145,440.00	£4,133.46	£4,221.45	2.13%
£145,440.00	£4,445.19	£4,540.37	2.14%
£139,418.00	£3,858.05	£3,953.51	2.47%
£140,263.25	£4,131.72	£4,224.15	2.24%
£191,925.75	£3,698.84	£3,816.89	3.19%
£153,769.91	£3,910.41	£3,989.09	2.01%
£144,623.09	£4,034.15	£4,112.03	1.93%
£146,192.50	£4,920.45	£5,015.66	1.94%
£137,676.80	£4,133.01	£4,153.67	0.50%
£137,651.20	£4,657.25	£4,739.28	1.76%
£152,088.75	£5,127.18	£5,218.72	1.79%
£148,575.75	£4,051.36	£4,124.89	1.81%

LAESTAB	School Name	2023-24 Pupil numbers used as per APT submission. *(Note for some academies this may differ from the GAG data)	2023-24 Actual NFF Allocations per APT submission before de-delegation (maintained schools) and including premises factors *(For academies this will differ from the GAG data)	Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant	2023-24 Indicative NFF allocations using 2023-24 pupil numbers and data after Minimum Funding Guarantee and before de-delegation (maintained schools) including premises factors	Increase	Year on Year change
(a)	(b)	(c)	(d)	(e)	(f) [(d) + (e)]	(g)	(h) [(g) - (f)]	(i) [(g)/(f)-1]
9432512	Ramsden Infant School	103	636,209	£21,135.00	£657,344.17	£667,115.68	£9,771.51	1.49%
9432513	Vickerstown School	181	966,861	£30,833.00	£997,693.97	£1,012,802.38	£15,108.41	1.51%
9432514	Victoria Infant and Nursery School	171	815,947	£26,419.00	£842,365.55	£855,214.72	£12,849.17	1.53%
9432515	South Walney Junior School	193	934,011	£31,221.00	£965,231.82	£980,038.68	£14,806.85	1.53%
9432518	South Walney Infant and Nursery School	159	798,266	£25,927.00	£824,193.19	£836,775.00	£12,581.81	1.53%
9432521	Dane Ghyll Community Primary School and Nursery	211	973,308	£30,869.69	£1,004,177.51	£1,019,526.80	£15,349.29	1.53%
9432522	Yarlsdale Academy	217	959,802	£30,957.00	£990,758.80	£1,004,286.80	£13,528.00	1.37%
9432627	Sir John Barrow School	201	951,437	£32,797.00	£984,234.23	£999,187.03	£14,952.80	1.52%
9432700	Sedbergh Primary School	128	643,670	£21,094.00	£664,764.43	£675,025.23	£10,260.80	1.54%
9432701	George Romney Junior School	97	534,591	£18,965.00	£553,555.58	£561,891.75	£8,336.17	1.51%
9432704	Barrow Island Community Primary School	139	784,832	£25,523.00	£810,355.46	£822,500.53	£12,145.07	1.50%
9432708	North Walney Primary & Nursery School	24	262,118	£8,614.00	£270,731.71	£274,533.59	£3,801.89	1.40%
9432712	Newbarns Primary & Nursery School	395	1,773,157	£55,155.00	£1,828,311.74	£1,856,364.39	£28,052.65	1.53%
9432715	Ormskill Nursery and Primary School	178	1,080,612	£36,820.00	£1,117,431.94	£1,134,053.97	£16,622.03	1.49%
9433013	High Hesket CoFE School	143	656,335	£21,839.00	£678,173.99	£688,539.79	£10,365.79	1.53%
9433019	Kirkoswald CoFE Primary	60	414,323	£12,170.00	£426,493.34	£432,835.75	£6,342.41	1.49%
9433021	Langwithby CoFE Primary School	135	684,481	£22,447.00	£706,927.86	£717,640.24	£10,712.38	1.52%
9433052	Burton Morewood CoFE Primary School	139	679,178	£22,611.00	£702,329.31	£713,145.64	£10,816.33	1.54%
9433054	Levens CoFE School	79	500,193	£14,535.00	£514,728.28	£516,645.30	£1,917.02	0.37%
9433056	Old Hutton CoFE School	101	542,259	£17,257.00	£559,515.78	£568,078.01	£8,562.24	1.53%
9433057	Staveley CoFE School	98	558,591	£17,420.00	£576,010.91	£584,683.27	£8,672.37	1.51%
9433058	Storth CoFE School	85	465,624	£15,145.00	£480,769.41	£488,096.60	£7,327.19	1.52%
9433059	Temple Sowerby CoFE Primary School	46	376,640	£10,400.00	£387,040.24	£392,764.15	£5,723.91	1.48%
9433061	Asby Endowed School	12	230,624	£6,042.00	£236,666.37	£240,075.83	£3,409.46	1.44%
9433064	Vicarage Park CoFE Primary School	101	541,902	£17,569.00	£559,471.23	£567,809.05	£8,337.82	1.49%
9433115	Threlkeld CoFE Primary School	43	352,887	£10,251.00	£363,138.14	£368,572.41	£5,434.27	1.50%
9433122	Coniston CoFE Primary School	59	415,755	£12,363.00	£428,117.94	£434,502.11	£6,384.17	1.49%
9433123	Grange CoFE Primary School	142	697,580	£22,448.00	£720,027.76	£730,930.72	£10,902.96	1.51%
9433124	Burlington CoFE School	62	428,533	£12,512.00	£441,045.02	£447,645.92	£6,600.90	1.50%
9433125	Allithwaite CoFE Primary School	94	500,990	£17,048.00	£518,038.35	£525,863.53	£7,825.18	1.51%
9433126	Cartmel CoFE Primary School	61	405,626	£12,497.00	£418,123.30	£419,368.61	£1,245.31	0.30%
9433128	Pennington CoFE School	196	878,184	£29,602.00	£907,785.50	£921,466.98	£13,681.48	1.51%
9433130	Lindale CoFE Primary School	48	369,808	£10,326.00	£380,133.98	£385,791.57	£5,657.59	1.49%
9433132	Broughton CoFE Primary and Nursery School	112	593,514	£18,878.00	£612,391.52	£614,606.03	£2,214.51	0.36%
9433150	St George's CoFE School	199	1,150,608	£38,903.00	£1,189,511.38	£1,207,699.05	£18,187.67	1.53%
9433212	Low Furness CoFE Primary School	131	645,101	£20,723.00	£665,823.72	£675,855.60	£10,031.88	1.51%
9433304	Calthwaite CoFE School	66	445,801	£13,404.00	£459,204.92	£466,130.87	£6,925.95	1.51%
9433305	Culgaith CoFE School	33	307,836	£8,437.00	£316,273.08	£320,962.77	£4,689.69	1.48%
9433309	Ivegill CoFE School	86	499,515	£15,576.00	£515,090.63	£522,962.88	£7,872.25	1.53%
9433310	Lazonby C of E Primary School	86	493,362	£15,264.00	£508,626.23	£516,392.01	£7,765.78	1.53%
9433315	St Catherine's Catholic Primary School	109	547,831	£19,249.00	£567,080.29	£575,851.47	£8,771.19	1.55%
9433319	Stainton CoFE Primary School	117	611,078	£18,953.00	£630,031.14	£639,679.98	£9,648.85	1.53%
9433352	Arnsdale National CoFE School	115	594,501	£20,067.00	£614,567.51	£624,054.71	£9,487.20	1.54%
9433354	Beetham CoFE Primary School	50	337,606	£10,876.00	£348,482.13	£353,020.62	£4,538.49	1.30%
9433355	St Oswald's CoFE Primary School	76	482,198	£15,218.00	£497,416.31	£504,971.55	£7,555.24	1.52%

2024-25 Lump sum, sparsity and premises factors to be excluded from the MFG Baseline	2023-24 Post MFG per pupil	2024-25 Post MFG per pupil	MFG % change
(j)	(k) [(f)-(i) / (c)]	(l) [(g)-(i) / (c)]	(m) [(l)/(k)-1]
£147,823.25	£4,946.81	£5,041.67	1.92%
£163,072.00	£4,611.17	£4,694.64	1.81%
£149,704.50	£4,050.65	£4,125.79	1.86%
£152,841.25	£4,209.28	£4,286.00	1.82%
£149,579.75	£4,242.85	£4,321.98	1.87%
£150,206.50	£4,047.26	£4,120.00	1.80%
£138,316.80	£3,928.30	£3,990.65	1.59%
£161,199.00	£4,094.70	£4,169.09	1.82%
£151,019.23	£4,013.63	£4,093.80	2.00%
£151,084.75	£4,149.18	£4,235.12	2.07%
£150,081.75	£4,750.17	£4,837.55	1.84%
£152,088.75	£4,943.46	£5,101.87	3.20%
£164,018.00	£4,213.40	£4,284.42	1.69%
£152,863.00	£5,418.93	£5,512.31	1.72%
£153,139.98	£3,671.57	£3,744.05	1.97%
£199,403.25	£3,784.83	£3,890.54	2.79%
£159,608.03	£4,054.22	£4,133.57	1.96%
£146,678.18	£3,997.49	£4,075.31	1.95%
£196,184.37	£4,032.20	£4,056.47	0.60%
£174,161.57	£3,815.39	£3,900.16	2.22%
£184,553.47	£3,994.46	£4,082.96	2.22%
£148,699.46	£3,906.71	£3,992.91	2.21%
£196,643.75	£4,139.05	£4,263.49	3.01%
£193,959.10	£3,558.94	£3,843.06	7.98%
£154,722.50	£4,007.41	£4,089.97	2.06%
£192,188.62	£3,975.57	£4,101.95	3.18%
£198,400.25	£3,893.52	£4,001.73	2.78%
£151,171.56	£4,006.03	£4,082.81	1.92%
£196,619.00	£3,942.36	£4,048.82	2.70%
£145,063.75	£3,967.81	£4,051.06	2.10%
£169,060.65	£4,082.99	£4,103.41	0.50%
£149,203.50	£3,870.32	£3,940.12	1.80%
£194,890.25	£3,859.24	£3,977.11	3.05%
£169,489.72	£3,954.48	£3,974.25	0.50%
£139,551.00	£5,276.18	£5,367.58	1.73%
£167,173.43	£3,806.49	£3,883.07	2.01%
£193,232.40	£4,029.89	£4,134.83	2.60%
£192,385.34	£3,754.17	£3,896.29	3.79%
£184,037.20	£3,849.46	£3,941.00	2.38%
£184,497.12	£3,768.94	£3,859.24	2.40%
£136,512.20	£3,950.17	£4,030.64	2.04%
£161,517.27	£4,004.39	£4,086.86	2.06%
£163,412.97	£3,923.08	£4,005.58	2.10%
£150,100.62	£3,967.63	£4,058.40	2.29%
£188,309.96	£4,067.19	£4,166.60	2.44%

LAESTAB	School Name	2023-24 Pupil numbers used as per APT submission. *(Note for some academies this may differ from the GAG data)	2023-24 Actual NFF Allocations per APT submission before de-delegation (maintained schools) and including premises factors *(For academies this will differ from the GAG data)	Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant	2023-24 Indicative NFF allocations using 2023-24 pupil numbers and data after Minimum Funding Guarantee and before de-delegation (maintained schools) including premises factors	Increase	Year on Year change
(a)	(b)	(c)	(d)	(e)	(f) [(d) + (e)]	(g)	(h) [(g) - (f)]	(i) [(h)/(f)-1]
9433356	Crosby Ravensworth CoFE School	21	264,591	£7,217.00	£271,808.39	£275,806.52	£3,998.13	1.47%
9433357	Crosscraze CoFE Primary School	59	401,304	£12,155.00	£413,458.53	£419,695.25	£6,236.72	1.51%
9433358	Crosthwaite CoFE School	90	517,048	£15,844.00	£532,892.29	£541,040.61	£8,148.33	1.53%
9433359	St Patrick's CoFE School	70	459,608	£13,776.00	£473,383.88	£480,541.69	£7,157.81	1.51%
9433360	Grasmere CoFE Primary School	71	453,217	£13,479.00	£466,696.13	£473,771.90	£7,075.77	1.52%
9433361	Grayrigg CoFE School	77	476,467	£13,985.00	£490,451.70	£497,886.95	£7,435.25	1.52%
9433362	Langdale CoFE School	24	282,543	£8,198.00	£290,740.85	£295,044.87	£4,304.02	1.48%
9433365	St Thomas's CoFE Primary School	198	929,648	£32,128.00	£961,775.52	£976,943.11	£15,167.59	1.58%
9433367	St Mary's CoFE Primary School	211	933,138	£31,179.00	£964,316.80	£976,392.80	£12,076.00	1.25%
9433368	Morland Area CoFE Primary School	102	538,403	£17,480.00	£555,882.69	£564,434.32	£8,551.63	1.54%
9433370	St Mark's CoFE Primary School	154	705,480	£24,084.00	£729,563.62	£740,902.76	£11,339.14	1.55%
9433372	Patterdale CoFE Primary School	35	327,154	£8,987.00	£336,141.50	£341,133.88	£4,992.38	1.49%
9433373	Selside Endowed CoFE Primary School	30	294,781	£8,080.00	£302,860.79	£307,352.41	£4,491.62	1.48%
9433374	Shap Endowed CoFE Primary School	78	487,968	£15,040.00	£503,007.66	£510,630.20	£7,622.54	1.52%
9433381	Dent CoFE Voluntary Aided Primary School	34	311,654	£9,076.00	£320,729.81	£325,502.45	£4,772.64	1.49%
9433450	Dean Gibson Catholic Primary School, Kendal	162	749,896	£25,556.00	£775,451.67	£787,511.81	£12,060.15	1.56%
9433451	Lowther Endowed School	55	400,927	£11,887.00	£412,814.13	£419,018.65	£6,204.53	1.50%
9433452	Dean Barwick Primary School	56	394,149	£11,902.00	£406,051.01	£412,187.73	£6,136.73	1.51%
9433453	St Cuthberts Catholic Primary School, Windermere	39	298,155	£10,191.00	£308,345.89	£310,727.49	£2,381.59	0.77%
9433550	Leven Valley CoFE Primary School	65	431,170	£12,869.00	£444,038.87	£450,767.76	£6,728.89	1.52%
9433551	Our Lady of the Rosary Catholic Primary School	77	447,653	£15,233.00	£462,886.14	£469,984.30	£7,098.15	1.53%
9433552	St Mary's Catholic Primary School	119	578,344	£19,919.00	£598,263.20	£607,518.52	£9,255.31	1.55%
9433556	Penny Bridge CoFE School	103	548,124	£17,079.00	£565,202.76	£573,848.62	£8,645.86	1.53%
9433557	Church Walk CoFE Primary School	99	507,210	£17,331.00	£524,540.51	£532,613.34	£8,072.84	1.54%
9433601	St James' CoFE Junior School	120	688,181	£24,926.00	£713,107.42	£724,065.39	£10,957.97	1.54%
9433602	Sacred Heart Catholic Primary School, Barrow	174	973,895	£32,912.00	£1,006,806.85	£1,019,966.29	£13,159.44	1.31%
9433603	St Columba's School	179	831,578	£27,371.00	£858,949.28	£872,322.76	£13,373.48	1.56%
9433606	St Pius X Catholic Primary School	194	1,023,706	£35,188.00	£1,058,893.65	£1,075,082.56	£16,188.91	1.53%
9433607	Holy Family Catholic Primary School	196	881,565	£28,978.00	£910,542.79	£924,661.82	£14,119.03	1.55%
9433656	Warcop CoFE Primary School	83	505,320	£15,635.00	£520,954.72	£528,882.07	£7,927.35	1.52%
9434003	Walney School	488	3,073,512	£108,756.00	£3,182,268.41	£3,232,286.28	£50,017.86	1.57%
9434011	Samuel King's School	81	746,742	£21,906.00	£768,648.49	£771,382.33	£2,733.84	0.36%
9434013	Queen Elizabeth Studio School	281	1,914,593	£61,700.00	£1,976,292.55	£1,985,502.01	£9,209.46	0.47%
9434056	The Lakes School	409	2,561,132	£85,624.00	£2,646,755.53	£2,685,708.66	£38,953.13	1.47%
9434060	Settlebeck School	208	1,465,658	£45,668.00	£1,511,325.78	£1,517,754.71	£6,428.92	0.43%
9434150	Dowdales School	798	4,884,006	£167,190.00	£5,051,195.96	£5,129,422.18	£78,226.22	1.55%
9434151	John Ruskin School	244	1,740,294	£52,608.00	£1,792,902.18	£1,800,592.97	£7,690.79	0.43%
9434152	Ulverston Victoria High School	1,054	6,190,491	£210,992.00	£6,401,483.43	£6,484,818.00	£83,334.57	1.30%
9434310	Ullswater Community College	1,327	7,866,924	£273,108.00	£8,140,031.98	£8,268,963.56	£128,931.58	1.58%
9434634	St Bernards Catholic High School, Barrow	681	4,390,488	£154,652.00	£4,545,139.66	£4,616,845.72	£71,706.06	1.58%
9435204	St Paul's CoFE Junior School	68	397,967	£13,434.00	£411,400.97	£417,658.30	£6,257.32	1.52%
9435206	Appleby Primary School	169	793,624	£27,949.00	£821,573.04	£834,337.43	£12,764.39	1.55%
9435207	Askam Village School	140	664,265	£22,418.00	£686,683.31	£697,286.01	£10,602.70	1.54%
9435208	Flookburgh CoFE Primary School	57	400,668	£11,397.00	£412,065.35	£418,240.38	£6,175.02	1.50%
9435210	Dalton St Mary's CoFE Primary School	202	898,742	£30,420.00	£929,162.04	£936,659.88	£7,497.84	0.81%

2024-25 Lump sum, sparsity and premises factors to be excluded from the MFG Baseline	2023-24 Post MFG per pupil	2024-25 Post MFG per pupil	MFG % change
(j)	(k) [(f)-(i) / (c)]	(l) [(g)-(i) / (c)]	(m) [(l)/(k)-1]
£192,149.12	£3,793.30	£3,983.69	5.02%
£193,714.60	£3,724.47	£3,830.18	2.84%
£181,022.72	£3,909.66	£4,000.20	2.32%
£193,122.80	£4,003.73	£4,105.98	2.55%
£192,777.97	£3,858.00	£3,957.66	2.58%
£190,342.11	£3,897.53	£3,994.09	2.48%
£192,074.44	£4,111.10	£4,290.43	4.36%
£137,902.60	£4,160.97	£4,237.58	1.84%
£138,082.80	£3,915.80	£3,973.03	1.46%
£172,565.52	£3,758.01	£3,841.85	2.23%
£137,284.20	£3,845.97	£3,919.60	1.91%
£192,159.36	£4,113.78	£4,256.41	3.47%
£192,406.12	£3,681.82	£3,831.54	4.07%
£192,073.12	£3,986.34	£4,084.07	2.45%
£193,121.40	£3,753.19	£3,893.56	3.74%
£137,164.80	£3,940.04	£4,014.49	1.89%
£193,174.00	£3,993.46	£4,106.27	2.82%
£192,108.16	£3,820.41	£3,929.99	2.87%
£136,832.00	£4,397.79	£4,458.86	1.39%
£192,530.00	£3,869.37	£3,972.89	2.68%
£136,550.40	£4,238.13	£4,330.31	2.18%
£136,473.60	£3,880.58	£3,958.36	2.00%
£172,381.97	£3,813.79	£3,897.73	2.20%
£135,970.60	£3,924.95	£4,006.49	2.08%
£137,274.53	£4,798.61	£4,889.92	1.90%
£136,524.80	£5,001.62	£5,077.25	1.51%
£136,743.60	£4,034.67	£4,109.38	1.85%
£137,907.20	£4,747.35	£4,830.80	1.76%
£138,057.20	£3,941.25	£4,013.29	1.83%
£187,102.37	£4,022.32	£4,117.83	2.37%
£172,170.31	£6,168.23	£6,270.73	1.66%
£221,881.40	£6,750.21	£6,863.96	0.50%
£134,400.00	£6,554.78	£6,587.55	0.50%
£265,702.08	£5,821.65	£5,916.89	1.64%
£225,540.80	£6,181.66	£6,212.57	0.50%
£269,601.00	£5,991.97	£6,090.00	1.64%
£254,744.00	£6,303.93	£6,335.45	0.50%
£300,488.00	£5,788.42	£5,867.49	1.37%
£162,730.00	£6,011.53	£6,108.69	1.62%
£157,458.29	£6,443.00	£6,548.29	1.63%
£136,589.00	£4,041.35	£4,133.37	2.28%
£138,624.40	£4,041.12	£4,116.65	1.87%
£137,928.20	£3,919.68	£3,995.41	1.93%
£192,103.10	£3,858.99	£3,967.32	2.81%
£137,697.40	£3,918.14	£3,955.26	0.95%

LAESTAB	School Name	2023-24 Pupil numbers used as per APT submission. *(Note for some academies this may differ from the GAG data)	2023-24 Actual NFF Allocations per APT submission before de-delegation (maintained schools) and including premises factors *(For academies this will differ from the GAG data)	Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant	2024-25 Indicative NFF allocations using 2023-24 pupil numbers and data after Minimum Funding Guarantee and before de-delegation (maintained schools) including premises factors at 2023-24 Levels	Increase	Year on Year change
(a)	(b)	(c)	(d)	(e)	(f) [(d) + (e)]	(g)	(h) [(g) - (f)]	(i) [(g)/(f)-1]
9435213	Ireleth St Peter's CofE Primary School	62	363,690	£12,616.00	£376,305.63	£382,049.14	£5,743.50	1.53%
9435217	Orton CofE School	53	384,936	£10,921.00	£395,856.92	£401,794.85	£5,937.93	1.50%
9435221	Beaconside CofE Primary School	439	1,941,830	£65,695.00	£2,007,525.20	£2,033,571.94	£26,046.74	1.30%
9435225	Penruddock Primary School	45	371,633	£10,177.00	£381,809.75	£387,380.12	£5,570.37	1.46%
9435400	Kirkbie Kendal School	900	5,190,992	£181,046.00	£5,372,037.97	£5,457,083.87	£85,045.91	1.58%
9435401	Queen Elizabeth Grammar School Penrith	801	4,602,163	£150,504.00	£4,752,667.00	£4,826,443.00	£73,776.00	1.55%
9435404	The Queen Katherine School	808	4,780,475	£171,248.00	£4,951,722.73	£5,030,075.53	£78,352.80	1.58%
9435405	Dallam School	907	5,579,011	£182,482.00	£5,761,493.16	£5,928,495.86	£167,002.71	2.90%
9435406	Kirkby Stephen Grammar School	294	1,885,723	£64,616.00	£1,950,339.08	£1,980,854.44	£30,515.37	1.56%
9435407	Appleby Grammar School	316	2,018,143	£67,886.00	£2,086,028.82	£2,118,700.33	£32,671.51	1.57%
9435410	Cartmel Priory CofE School	340	2,114,073	£71,872.00	£2,185,945.37	£2,220,259.74	£34,314.37	1.57%
9435411	Queen Elizabeth School	999	5,747,027	£189,432.00	£5,936,459.08	£6,080,447.08	£143,988.00	2.43%
9436025	Chetwynde School	479	2,609,834	£88,899.00	£2,698,732.65	£2,741,143.94	£42,411.28	1.57%
9436908	Furness Academy	1,177	7,590,469	£269,920.00	£7,860,389.36	£7,984,456.22	£124,066.86	1.58%

2024-25 Lump sum, sparsity and premises factors to be excluded from the MFG Baseline	2023-24 Post MFG per pupil	2024-25 Post MFG per pupil	MFG % change
(j)	(k) [(f)-(i) / (c)]	(l) [(q)-(i) / (c)]	(m) [(l)/(k)-1]
£135,348.08	£3,886.41	£3,979.05	2.38%
£192,788.00	£3,831.49	£3,943.53	2.92%
£142,435.20	£4,248.50	£4,307.83	1.40%
£197,522.00	£4,095.28	£4,219.07	3.02%
£155,596.80	£5,796.05	£5,890.54	1.63%
£158,848.00	£5,735.10	£5,827.21	1.61%
£163,584.00	£5,925.91	£6,022.89	1.64%
£172,088.32	£6,162.52	£6,346.65	2.99%
£229,688.00	£5,852.55	£5,956.35	1.77%
£224,339.73	£5,891.42	£5,994.81	1.75%
£216,368.53	£5,792.87	£5,893.80	1.74%
£172,142.08	£5,770.09	£5,914.22	2.50%
£151,091.20	£5,318.67	£5,407.21	1.66%
£187,648.00	£6,518.90	£6,624.31	1.62%

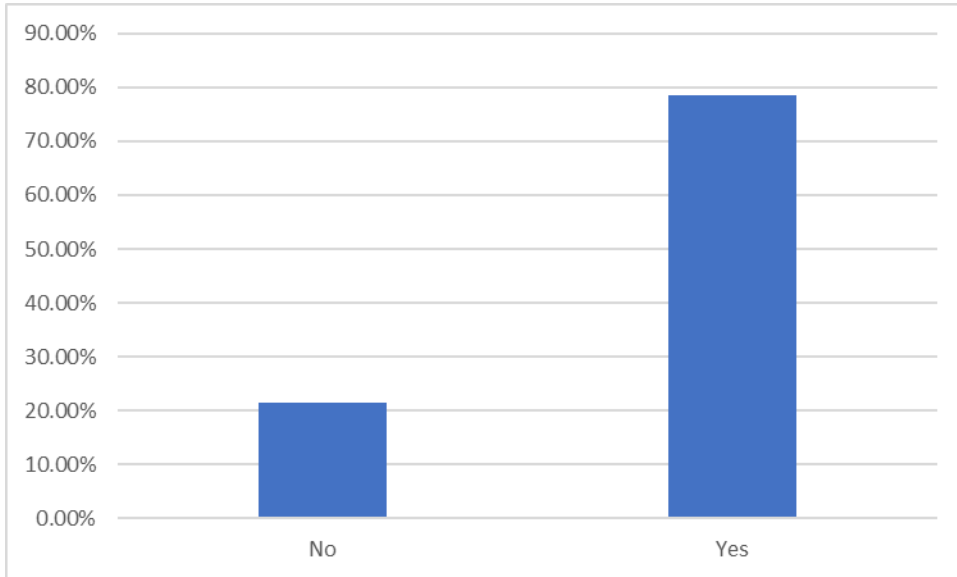
AGENDA ITEM 7

sf 011123 School Funding Formula 2024-25 Consultation Outcome – Appendix 3

School Funding Formula 2024/25 Consultation Responses

Q1 Do you agree with your Schools Forum recommendation that the National Funding Formula continues to be used to allocate funding to school in 2024/25?

Answered: 14



Comments (7)

Comment 1 - It makes sense to follow the national formula.

Comment 2 - Support the philosophy and proposal.

Comment 3 - It works well now.

Comment 4 - The formula, as far as I understand it, is not taking into account the % of pupils with EHCPs in a mainstream school. As a school with 3x the county average of EHCP pupils and little PP we are penalised in a lack of funding using this formula.

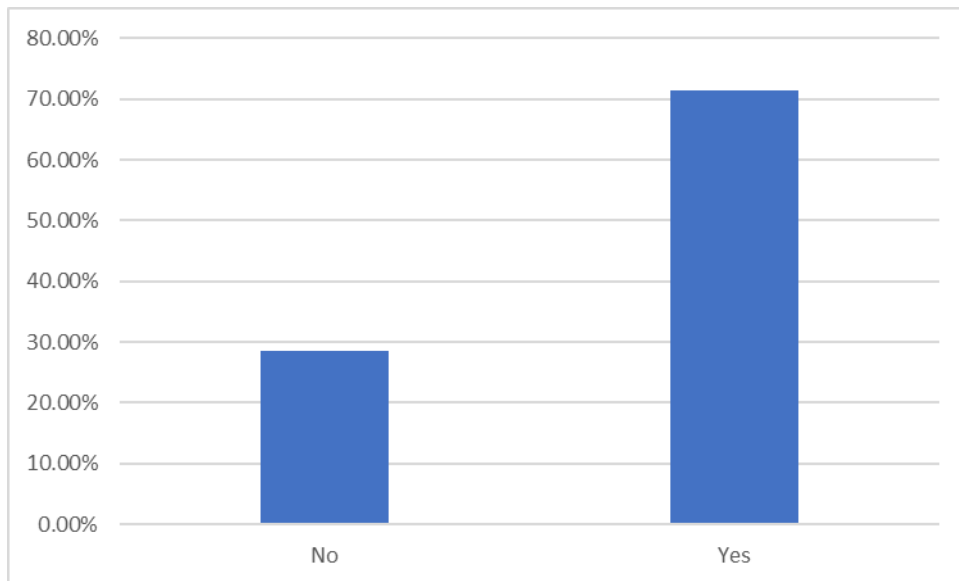
Comment 5 - This provides a 1.56% funding increase which is utterly ridiculous with inflation at 7%, utility bills not falling and unfunded support staff pay rises etc. The role of a SBM in a small secondary school is now impossible and we will have a deficit budget just to fund the basics. There is nothing else left to cut as confirmed by the SRMA. I assume staff will only be offered a 1.56% pay rise ??

Comment 6 - We are not aware of what the alternative would be.

Comment 7 - Public sector should mean that funding is equal!

Q2 Do you agree with your Schools Forum recommendation that if there is a shortfall in Schools Block funding after applying the National Funding Formula that this is managed by reducing the basic per pupil funding factor values in the formula?

Answered: 14



Comments (4)

Comment 1 - No- a reduction in basic per pupil funding would affect a school like ours significantly given that we have such a high percentage of SEND as stated above.

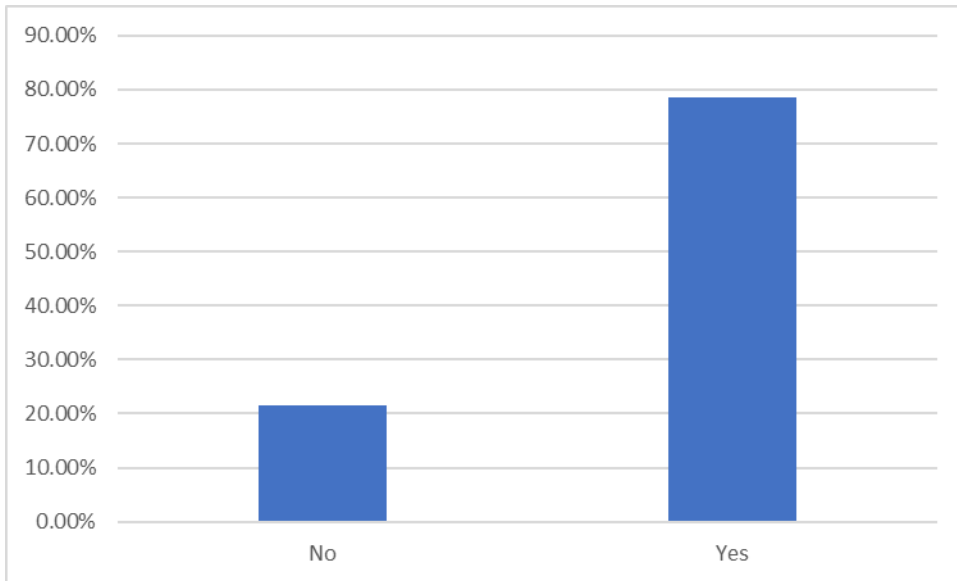
Comment 2 - Schools need the money - sorry!

Comment 3 - Inclusion should be for everyone. We appreciate there is a shortfall for high needs but taking from basic pupil funding will have a detrimental impact to the rest of the children.

Comment 4 - I think this is very difficult and although this seems the only 'fair' way it still has a massive impact on school funding particularly when we do not get additional funding for example: small school, deprivation etc, etc

Q3 Do you agree that, if there is any School Block funding remaining (up to a maximum of 0.5%) after allocating the school funding formula to schools using the NFF, it should be transferred to the High Needs Block?

Answered: 14



Comments (2)

Comment 1 - It should be used to top up the NFF to benefit from this.

Comment 2 - Or to schools with high levels of EHCPs.

WESTMORLAND & FURNESS COUNCIL SCHOOLS FORUM
Report Title: Maintained Schools De-delegation 2024/25
Meeting date: 1 November 2023
Report of: Mil Vasic, Director Children's Services

1.0 Executive Summary

- 1.1 In July 2023 the DfE confirmed that de-delegation will continue to be an option for maintained schools in 2024/25. The Schools Forum representatives for maintained schools are required on an annual basis to decide on the de-delegation options and are asked to vote on the options for 2024/25 separately, by primary and secondary phase.
- 1.2 The proposed de-delegation budgets are fixed amounts and therefore the primary and secondary per pupil rates for each authority are indicative as they have been based on October 2022 census pupil numbers. These will be updated in January 2024 to reflect October 2023 census pupil numbers.

2.0 Link to Council Plan Priorities

- 2.1 Ensuring that maintained schools have access to services provided centrally is supportive of the Council Plan priorities that "People in Westmorland and Furness are healthy, happy, active and able to lead fulfilling independent lives, thriving in their communities" and the commitment to reduce inequality and "ensure that young people have enough opportunities to access the best education".

3.0 Recommendation

- 3.1 The Schools Forum representatives for maintained schools are recommended to continue to agree on behalf of the schools that they represent to de-delegate budget in 2024/25 for the services in paragraph 4.5.

4.0 Rationale and Evidence for the Recommendation

Background

- 4.1 De-delegated services are for maintained schools only, funding of these services must be allocated through the Schools Block via the school funding formula but can be passed back (de-delegated) for maintained primary and

secondary schools with Schools Forum approval. The DfE confirmed in July 2023 that de-delegation will continue to be an option for maintained schools in 2024/25.

- 4.2 The services that the de-delegated budgets apply to also impact maintained PRUs, special schools and nursery schools and therefore in Westmorland & Furness an element is centrally retained in both the Early Years and High Needs Block for these services, although there is no de-delegation process for these two areas. The split of these budgets across the blocks is based on pupil numbers.
- 4.3 The current de-delegated services for 2023/24 as agreed last year are set out below:

De-delegated Service	Primary	Secondary
Contingencies	√	√
Staff Costs	√	√
Library Services	√	X
Insurance	√	√
School Improvement	√	X

- 4.4 A breakdown of the services provided under these headings is at Appendix 1 to this paper. Contingencies include exceptional unforeseen costs, schools in financial difficulties and costs relating to new, re-organised or closed schools. The staffing costs include teacher maternity and union duties reimbursements.

Proposed De-delegated Budgets 2024/25

- 4.5 It is not anticipated that there will be any change from the 2023/24 budgets as shown in the below table:

	Schools Block	High Needs Block	Early Years Block	Total 2023/24	Proposed Total 2024/25	Variance
	£m	£m	£m	£m	£m	£m
Contingencies	0.262	0.004	0.021	0.287	0.287	0.000
Insurance	0.281	0.004	0.023	0.307	0.307	0.000
Staff Costs	0.389	0.005	0.031	0.426	0.426	0.000
Library Services	0.174	0.003	0.019	0.197	0.197	0.000
School Improvement	0.216	0.004	0.024	0.244	0.244	0.000
Total	1.323	0.020	0.118	1.461	1.461	0.000

- 4.6 The number of schools being supported by these budgets has reduced by 3 so far during 2023/24 and the total de-delegated budgets associated with these schools is £0.068m but it is not proposed to change the value of the de-delegated budgets as a significant majority are linked to staff pay and therefore it is recommended that they continue, as in previous years, at the same level to allow for pay inflation and other cost pressures due to rising prices.
- 4.7 The figures in the table above are indicative figures only, final de-delegated budgets will be confirmed in January 2024 and the split between blocks will be based on the October 2023 census pupil data.

Insurance Arrangements

- 4.8 The Council's current insurance contracts with Zurich (property and vehicle insurance) and Maven Public Sector (liability and fidelity guarantee insurances) commenced on 1 April 2023 and is for a period of 3 years ending 31 March 2026. As the Schools Forum representatives for maintained schools agreed to continue to de-delegate for insurance in 2023/24 the next opportunity to consider new insurance options for maintained schools will be 2026.
- 4.9 Therefore, maintained school representatives are asked to vote separately for the primary and secondary phases on whether to also continue to de-delegated budget for the Contingency, Staffing, Library services and School Improvement in 2024/25. The decision is binding for all schools in that phase.
- 4.10 It should be noted if Schools Forum do not agree the de-delegated budgets and/or propose revised de-delegated budgets there is a risk that this will impact on continuity of services for maintained schools who will need to seek alternative arrangements to continue to access the same level of services that they currently receive from these budgets.

5.0 Options

5.1 The Schools Forum representatives for maintained schools can:

- Confirm agreement to de-delegate in 2024/25 by voting separately for primary and secondary schools for the following services:

	Primary		Secondary	
De-delegated Service	De-delegated in 2023/24	De-delegate in 2024/25?	De-delegated in 2023/24	De-delegate in 2024/25?
Contingencies	Yes		Yes	
Staff Costs	Yes		Yes	
Library Services	Yes		No	
School Improvement	Yes		No	

and (subject to the above):

Option 1

- Agree the proposed 2024/25 de-delegated budgets as shown in table at para 4.5;

Option 2

- Not agree the proposed 2024/25 de-delegated budgets as shown in table at para 4.5

And

- Propose revised 2024/25 de-delegated budgets.

5.2 It should be noted that the budgets at para 4.5 are indicative and final budgets will be confirmed in January 2023 along with the per pupil funding rates.

6.0 Financial and Other Relevant Implications

6.1 Resource and value for money implications are considered throughout this report. No equality/legal/ implications have been identified.

25 October 2023

Appendices:

1. Westmorland and Furness De-delegated Budgets 2023/24

REPORT AUTHOR

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De-delegated Budgets 2023/24

Contingencies

The DfE guidance states that the contingency budget can be used for three purposes:

- Exceptional unforeseen costs which it would be unreasonable to expect governing bodies to meet
- Schools in financial difficulties
- Additional costs relating to new, reorganised or closing schools

For 2023/24 the contingencies budget is £287,022.

Within the Schools Block funding formula, maintained school budgets are reduced by £15.57 (primary) and £23.08 (secondary) per pupil to fund this.

Insurance

The local authority purchases insurance on behalf of maintained schools through the de-delegation arrangement. This covers the main classes of insurance - property, business interruption, liability and money. It does not cover other types of insurance – for example, motor insurance, school journey insurance and supply teacher insurance. The Roman Catholic Diocese purchases insurance on behalf of Catholic schools (13 schools) for certain insurances. These schools receive a rebate from the de-delegation in respect of this. The table below outlines the insurances that are covered by the de-delegated budget:

Insurance Type	Funded by the De-delegated insurance budget?
Material Damage	Yes except for the 13 Catholic schools
Business Interruption	Yes except for the 13 Catholic schools
Work In Progress	Yes except for the 13 Catholic schools
Money	Yes
Employer's Liability	Yes
Public Liability	Yes
Official's Indemnity	Yes
Libel & Slander	Yes

Fidelity Guarantee	Yes
Personal Accident	Yes
Local Management of Schools (Balance of Risks)	No
School Journey	No
Supply Teacher	No
Motor	No
Occasional Business Use	No
Selected All Risks	No

For 2023/24, the de-delegated insurance budget is £307,139.

Within the Schools Block funding formula, maintained school budgets are reduced by £16.66 (primary) and £24.70 (secondary) per pupil to fund this. In line with how de-delegation operates, this is applied to all schools with the schools within the Roman Catholic diocese receiving a rebate for a portion of this deduction to reflect the insurance categories funded by the diocese.

Library Services

The de-delegated budget covers the following services for primary schools, nursery schools and special schools:

- Book Loans – termly book boxes to support both the curriculum and reading for pleasure, chosen from specially selected stock; long term loans - during the year schools will be able to borrow up to their entitlement with the opportunity to exchange all or a proportion of the total. This can either be through the mobile library visit or through an alternative arrangement as agreed
- Mobile Library Service – giving children the opportunity to choose their own books in a unique library environment
- Spellbinding – annual book award and reading challenge for Y5 and Y6 to encourage reading for pleasure, and build confidence in talking and writing about books
- Key Stage 1 reading challenge – newly introduced to help develop reading for pleasure from an early age

- Help line - Our telephone help line offers access to professional librarians who are able to provide information and advice on all aspects of library services and library development

Service entitlements are based on current usage of the service and pupil numbers from the October census returns.

Schools are notified of their entitlement annually in writing and are invited to contact Library Services for Schools to discuss their entitlement or any other aspect of the service.

A charge will be made where a school requests a service in addition to their agreed entitlement and this will be invoiced separately.

For 2023/24, the de-delegated library services budget is £196,566

Within the Schools Block funding formula, maintained school budgets are reduced by £15.78 (primary) per pupil to fund this.

Staff Costs

The de-delegated staff costs budget comprises the following:

Maternity/ Adoption Leave

Schools are reimbursed by the government for 92% of Statutory Maternity and Adoption Pay. The remaining 8% and all of the Occupational Maternity/ Adoption Pay is reimbursed to maintained schools in respect of teachers from this de-delegated budget. Maintained schools must submit evidence and reports to the local authority/ their payroll provider to claim this.

Reimbursement of Union Duties

Maintained schools receive reimbursement in respect of staff time spent performing agreed duties on behalf of the county in relation to unions.

HR Advisory

HR Advisory support to maintained schools and HR administration.

For 2023/24, the de-delegated staff costs budget is £425,852.

Within the Schools Block funding formula, maintained school budgets are reduced by £23.10 (primary) and £34.25 (secondary) per pupil to fund this.

School Improvement

The budget supports the work of the School Improvement Team on improving and preparing schools for Ofsted inspection.

For 2023/24, the de-delegated school improvement budget is £244,072.

Within the Schools Block funding formula, maintained school budgets are reduced by £19.60 (primary) per pupil to fund this.

WESTMORLAND & FURNESS COUNCIL SCHOOLS FORUM
Report Title: Proposed Early Years Funding Formulae 2024/25
Meeting date: 1 November 2023
Report of: Mil Vasic, Director Children's Services

1.0 Executive Summary

- 1.1 This paper presents the modelling of the proposed new local funding formulae for 2 year olds and Under 2s for 2024/25 and the draft consultation (Appendix 1) with Westmorland & Furness early years providers including maintained schools, academies and private, voluntary and independent (PVI) providers.
- 1.2 It is proposed that the new funding formulae comprises of an hourly base rate and the mandatory deprivation supplement. No changes are proposed to the existing 3-4 year old funding formula except that a new methodology is proposed for calculating the deprivation supplement which will reach more disadvantaged children than the current methodology.
- 1.3 The modelling and proposed hourly rates at provider level are based on the illustrative local authority level hourly rates published by the DfE in its consultation on funding the new free entitlements for 2 year olds and Under 2s. Therefore the proposed funding formulae rates at provider level are indicative and subject to the final local authority level hourly rates being confirmed.
- 1.4 It is also proposed that £0.037m of the new 2 year-old and Under 2s funding is centrally retained to support the roll out of the new entitlements. The Schools Forum is asked to support this proposal in principle, subject to the final LA level rates being confirmed and the draft consultation seeking views on the proposals from early years providers which is planned to be opened on Wednesday 8 November for a period of 3 weeks.
- 1.5 The consultation outcome will be presented at the 17 January 2024 meeting when the Schools forum will be asked to make a recommendation to Cabinet who will decide on the final new funding formulae at its meeting on 13 February 2024.

2.0 Link to Council Plan Priorities

2.1 Ensuring that early years providers are appropriately funded is supportive of the Council Plan priorities that “People in Westmorland & Furness are healthy, happy, active and able to lead fulfilling independent lives, thriving in their communities” and the commitment to reduce inequality and “ensure that young people have enough opportunities to access the best education”.

3.0 Recommendation

3.1 The Schools Forum is recommended to:

- support the proposed centrally retained budget of £0.037m;
- consult early years providers on the proposed new funding formulae for 2 year olds and Under 2s and new methodology for calculating the deprivation supplement;
- support the draft consultation document at Appendix 1 which includes 4 recommended questions to ask early years providers.

4.0 Rationale & Evidence for the Recommendation

Background

4.1 Currently all parents of 3-4 year olds can access 15 hours of free early education for 38 weeks of the year and working parents can access an additional 15 hours of free entitlement. Parents of disadvantaged 2-year olds can access 15 hours of free entitlement. The government are extending the eligibility to free entitlement so that all working parents will be able to access 30 hours of free entitlement for 38 weeks of the year from the term after their child turns 9 months old. This will be rolled out in stages:

- From April 2024 all working parents of 2-year olds can access 15 hours per week
- From September 2024 all working parents of children aged 9 months up to 3-years old can access 15 hours per work extending to 30 hours from September 2025

4.2 The DfE has consulted local authorities and early years providers on its proposals for funding local authorities for the new early years free entitlement and in July 2023 published illustrative local authority level hourly funding rates for 2 year olds and Under 2s which for Westmorland & Furness are as follows:

Phase	LA Hourly Funding Rate
2-year olds	£7.09
Under 2-year olds	£9.61

- 4.3 The DfE proposes to apply the same funding rules to the new 2 year old and Under 2s funding which currently apply to the 3-4 year old funding which are as follows:
- LAs must use a universal base rate of funding for all providers regardless of type;
 - LAs must plan to pass-through at least 95% of the funding that it receives in 2024/25 to early years providers (rising to 97% from 2025/26).
 - LAs are required to establish a SEN Inclusion Fund to support children who are taking up the 3-4 year old free entitlements, targeted at children with lower level and emerging SEN.
 - LAs can use a restricted number of supplements in their 3-4 year old funding formula to channel additional funding (up to a cap of 12% of planned formula funding to providers) meeting criteria set by the LA.
 - LAs can set aside contingency funding as part of their local budgetary process to help manage fluctuations in take-up.
- 4.4 All 2 year-olds and Under 2s meeting the existing criteria for Early Years Pupil Premium (EYPP) and Disability Access Funding (DAF) for 3-4 year olds will be eligible for additional funding.
- 4.5 The DfE are not proposing to make any changes to way funding is allocated to local authorities for 3-4 year olds or the maintained nursery school (MNS) supplementary funding. The outcome of the DfE consultation has not yet been published although the principles it will apply are not expected to be significantly different to those proposed in its consultation.

Proposed New 2-Year Olds and Under 2s Funding Formulae

- 4.6 The DfE has provided local authorities with estimated numbers of part-time equivalent (PTEs) children that they anticipate will take-up the new entitlements to help them plan their budgets and shape their local funding formulae.
- 4.7 Currently, the local authority passes on the full hourly funding rate it receives for disadvantaged 2 year olds to early years providers. In 2024/25 local authority will be allowed to retain up to 5% of the new funding it receives for 2 year olds and Under 2s centrally with the support of Schools Forum.
- 4.8 In considering the shape of the new funding formulae at provider level the local authority first needs to consider what level of funding is needed to support early years providers centrally and how much SEN Inclusion Fund will be required. The remaining funding after taking these 2 factors into account is available for the new early years funding formulae for 2 year olds and Under 2s.
- 4.9 Consideration has been given to the additional resource and administration that will be associated with the roll out of the new free entitlements and, based

on the principle that as much funding as possible should be passed directly onto early years providers with central spend kept at a minimum, it is proposed that £0.037m (split as £0.026m for 2 year olds and £0.010m for Under 2s) of the new funding is retained centrally to support the early years staffing team.

- 4.10 Currently, the SEN Inclusion Fund budget for disadvantaged 2-year olds is £0.020m. Based on estimated take-up of the new free entitlements it is anticipated that £0.098m (split as £0.071m for 2 year olds and £0.027m for Under 2s) will be required. This has been calculated based on the estimated number of children taking up the new entitlements requiring SEND support multiplied by the current average hourly funding rate claimed of £3.04 x 15 hours x 38 weeks. It is estimated that 2.83% of total children taking up the new entitlements will access the fund and this has been based on the same percentage of children currently receiving support from the fund. It is proposed the current criteria for accessing SENIF and the 3 Levels of support based on need will remain the same as it is currently for the time being.
- 4.11 It is proposed that the new funding formulae at provider level comprise of an hourly base rate and the mandatory deprivation supplement mirroring the current 3-4 year old funding formula (with the exception of the quality supplement which provides additional funding to school-based providers of early years provision that were in receipt of the former teacher pay and pension grants).
- 4.12 It is not proposed to use any of the other optional supplements available for local authorities to use which are as follows:
- Flexibility: to support providers offering flexible provision for parents – e.g. out of hours / wraparound;
 - Rurality / Sparsity: to enable local authorities to support providers serving rural areas less likely to benefit from economies of scale;
 - English as an additional language: to recognise differences in attainment in the Early Years Foundation Stage between children whose first language is English, and those who have English as an additional language (EAL).
- 4.13 There are 2 main reasons why the use of the optional supplements is not recommended. Firstly, the hourly funding rate at local authority level does not reflect any additional funding in recognition of rurality or flexibility and secondly channelling funding through supplements reduces the hourly base rate for all providers as the funding available for the formula is a fixed amount.
- 4.14 The current deprivation supplement for the 3-4 year old funding formula is £0.21 per hour. It is allocated to providers based on eligible children using a combination of deprivation measures comprising of 60% ACORN, 20% IDACI and 20% IMD. In the 2022/23 academic year 13.37% of 3-4 year olds in the local authority attracted funding through this supplement.
- 4.15 It is proposed to use the same rate for the new 2 year old and Under 2s funding formulae but to change the methodology used to allocate the supplement to

providers to target more disadvantaged children. It is proposed to allocate the supplement to providers using IDACI by allocating it to children whose postcodes are in the IDACI Bands A to F:

Band	Ranks	Description
A	1 to 821	Children in the most deprived 2.5% of LSOAs*
B	822 to 2463	Children in the next most deprived 5% of LSOAs
C	2464 to 4105	Children in the next most deprived 5% of LSOAs
D	4106 to 5747	Children in the next most deprived 5% of LSOAs
E	5748 to 9032	Children in the next most deprived 10% of LSOAs
F	9033 to 12316	Children in the next most deprived 10% of LSOAs
* LSOA - Lower Layer Super Output Area		

4.16 This will target funding to those children living in the 37.5% most deprived areas. By using this new proposed methodology it is estimated that 19.54% of 3-4 year olds would attract funding through this supplement. It is estimated that the same proportion of children taking up the new free entitlements would attract funding through this supplement.

4.17 Therefore, after taking into consideration the proposed centrally retained budgets, the SEN Inclusion fund and the estimated funding channelled through the deprivation supplement of £0.21 per hour the proposed base rate for the 2 year olds has been calculated as £6.93 and £9.45 for the Under 2s as summarised in the 2 tables below:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding *	%
Illustrative funding for 2024/25	1,442.75	£7.09	£5,830,586	100.00%
Proposed Centrally Retained Element:			£26,499	0.45%
Proposed SEN Inclusion Fund:	41	£3.04	£70,928	1.22%
	2.83%			
Funding Available for Formula:			£5,733,159	98.33%
<u>Proposed EYFF</u>				
Base Rate:	1,442.75	£6.93	£5,699,422	97.75%
Deprivation:	281.85	£0.21	£33,737	0.58%
	19.54%			
Total Early Years Formula Funding:			£5,733,159	98.33%
* total funding is calculated by taking the part-time Equivalents (PTEs) x hourly rate x 15 hours x 38 weeks				

Under 2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding*	%
Estimated funding for 2024/25	560.76	£9.61	£3,071,675	100.00%
Proposed Centrally Retained Element:			£10,299	0.34%
Proposed SEN Inclusion Fund:	15.88 2.83%	£3.04	£27,472	0.89%
Funding Available for Formula:			£3,033,904	98.77%
<u>Proposed EYFF</u>				
Base Rate:	560.76	£9.45	£3,020,791	98.34%
Deprivation:	109.55 19.54%	£0.21	£13,113	0.43%
Total Early Years Formula Funding:			£3,033,904	98.77%
* total funding is calculated by taking the part-time Equivalents (PTEs) x hourly rate x 15 hours x 38 weeks				

- 4.18 For the Under 2s it should be noted that the modelling has been based on a full year impact however, the proposed funding rates will apply from September 2024 in line with the planned roll out of this phase.
- 4.19 For the 2 year olds, it is recognised that the proposed combined base rate of £6.93 plus the deprivation supplement of £0.21 which totals £7.14 is lower than the current funding rate that providers receive of £7.28 for disadvantaged 2 year olds (which comprises of a base rate £5.63 and early years supplementary grant of £1.65).
- 4.20 This is partly due to the new funding formula used by the DfE to calculate the LA level funding rate which is based on a (national rate + additional needs) x area cost adjustment and funds both disadvantaged 2 year olds and working parents of 2 year olds whereas the current funding formula only funds disadvantaged 2 year olds.
- 4.21 Consideration has been given to increasing the deprivation supplement rate of £0.21 to a level that would uplift the combined base and deprivation rate to £7.28. However, as the funding available for the funding formula is a fixed amount the more funding allocated through the deprivation supplement the lower the amount of funding available for the base rate as the below example tables demonstrate:

Table 1 – Deprivation held at £0.21 per hour:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding *	%
<u>Proposed EYFF</u>				
Base Rate:	1,442.75	£6.93	£5,699,422	97.75%
Deprivation:	281.85 19.54%	£0.21	£33,737	0.58%
Total Early Years Formula Funding:			£5,733,159	98.33%

Table 2 – Impact on base rate of increasing Deprivation rate:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding *	%
<u>Proposed EYFF</u>				
Base Rate:	1,442.75	£6.90	£5,672,110	97.28%
Deprivation:	281.85	£0.38	£61,049	1.05%
	19.54%			
Total Early Years Formula Funding:			£5,733,159	98.33%

- 4.22 As shown in Table 2, the deprivation supplement would need to be set at £0.38 to achieve a combined rate of £7.28 but the base rate for all providers would reduce to £6.90 having a wider and significant impact on overall funding levels for all providers.
- 4.23 The impact of the proposed 2 year old base rate for the new free entitlement on those providers that currently charge parents has also been considered. The current hourly rates charged by providers to fee paying parents of 2 year olds varies but the average is in the region of £7.00 locally. Therefore, it is proposed to hold the deprivation rate at £0.21 to ensure that the base rate is as close to the average charged by providers as possible so that the impact of moving from fee paying to free entitlement is kept to a minimum.
- 4.24 In addition to the deprivation supplement additional funding to support disadvantaged children is available through the EYPP. The DfE have not yet announced the EYPP hourly rate for 2024/25 which local authorities are required to pass on to providers in full.
- 4.25 The indicative funding rates assume a standard 190 term days in the financial year (April to March), however, early years providers will continue to be funded based on the actual numbers of term days which can be higher or lower than 190 days each financial year.
- 4.26 The local authority is obliged to consult providers on any changes to existing and new early years funding formulae. Therefore, in anticipation that Schools Forum support the proposals attached at Appendix 1 is a draft consultation document seeking views from maintained schools, academies and PVI's.
- 4.27 The draft consultation asks 4 questions:
- 1) Local authorities are allowed to retain up to 5% of the new funding in 2024/25. Do you agree with your Schools Forum recommendation that the centrally retained funding for 2 year olds and Under 2s should be kept to a minimum to maximise the amount of the funding available to distribute to early years providers?
 - 2) Do you agree that the new funding formulae for 2 year olds and Under 2s should comprise of a base rate and the mandatory deprivation supplement only and not use the optional supplements?
 - 3) Do you agree that the deprivation supplement should be allocated to providers based on early years children accessing free entitlement living

in IDACI bandings A to F instead of the current methodology for deprivation?

- 4) Do you agree that the deprivation supplement hourly funding rate should be fixed at £0.21 to maximise the base rate paid to providers?

4.28 Schools Forum can recommend alternative questions to include. The consultation is planned to open on 8 November and run for a period of 3 weeks. The outcome of the consultation will be presented to Schools Forum on 17 January 2024 when it will be asked to make a recommendation to Cabinet members who will decide on the final early years funding formula for 2024/25 at its meeting on 13 February 2024.

5.0 Options

5.1 Schools Forum can:

- support the proposed centrally retained budget of £0.037m;

or

- not support the proposed centrally retained budget of £0.037m;

and

- support the proposed new funding formulae for 2 year olds and Under 2s comprising of a base rate and a mandatory deprivation supplement;
- support the proposed new methodology for calculating the deprivation supplement;
- support the draft consultation document at Appendix 1 and the 4 recommended questions to ask;

or

- recommend alternative questions to ask early years providers.

5.2 It should be noted the proposed hourly rates for the 2 year olds and Under 2s formulae is subject to final confirmation of the LA level hourly rates which are expected to be published later in the Autumn term.

6.0 Financial & Other Relevant Implications

6.1 Resource and value for money implications are considered throughout this report. No equality or diversity implications have been identified.

25 October 2023

Appendices:

1. Draft Westmorland & Furness Early Years Funding Formula 2024/25 Consultation

REPORT AUTHOR

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**Early Years Funding Formulae
for 2024/25
Consultation**

**Consultation between Westmorland & Furness Schools Forum and
Early Years Providers within Westmorland & Furness**

Consultation Commences: Wednesday 8 November 2023

**Deadline for responding to the [consultation](#): Wednesday 29 November
2023**

Introduction

1. Currently all parents of 3-4 year olds can access 15 hours of free early education for 38 weeks of the year and eligible working parents can access an additional 15 hours of free entitlement. Parents of disadvantaged 2-year olds can access 15 hours of free entitlement. The government is extending the eligibility to free entitlement so that all eligible working parents will be able to access 30 hours of free entitlement for 38 weeks of the year from the term after their child turns 9 months old. This will be rolled out in stages:
 - From April 2024 all eligible working parents of 2-year olds can access 15 hours per week
 - From September 2024 all eligible working parents of children aged 9 months up to 3-years old can access 15 hours per work extending to 30 hours from September 2025

2. The DfE has consulted local authorities and early years providers on its proposals for funding local authorities for the new early years free entitlement and in July 2023 published illustrative local authority level hourly funding rates for 2 year olds and Under 2s. These rates are how local authorities are funded for the new entitlements by the DfE and local authorities use a local funding formulae to pass on the funding to early year providers. The local authority level funding rates for Westmorland & Furness are as follows:

Phase	LA Hourly Funding Rate
2-year olds	£7.09
Under 2-year olds	£9.61

3. The DfE proposes to apply the same funding rules to the new 2 year old and Under 2s funding which currently apply to the 3-4 year old funding which are as follows:
 - LAs must use a universal base rate of funding for all providers regardless of type;
 - LAs must plan to pass-through at least 95% of the funding that it receives in 2024/25 to early years providers (rising to 97% from 2025/26).
 - LAs are required to establish a SEN Inclusion Fund (SENIF) to support children who are taking up the 3-4 year old free entitlements, targeted at children with lower level and emerging SEN.
 - LAs can use a restricted number of supplements in their 3-4 year old funding formula to channel additional funding (up to a cap of 12% of planned formula funding to providers) meeting criteria set by the LA.

- LAs can set aside contingency funding as part of their local budgetary process to help manage fluctuations in take-up.
4. All 2 year-olds and Under 2s meeting the existing criteria for Early Years Pupil Premium (EYPP) and Disability Access Funding (DAF) for 3-4 year olds will be eligible for additional funding.
 5. The DfE are not proposing to make any changes to way funding is allocated to local authorities for 3-4 year olds or the maintained nursery school (MNS) supplementary funding. The outcome of the DfE consultation has not yet been published although the principles it will apply are not expected to be significantly different to those proposed in its consultation.
 6. This document comprises a consultation with all Westmorland & Furness early years providers including maintained schools, academies and private, voluntary and independent providers to seek views on the proposed new local early years funding formulae for the new 2 year olds and Under 2s free entitlements for 2024/25. The consultation also considers a new methodology for allocating the deprivation supplement which is proposed to be used in the new 2 year olds, Under 2s and existing 3-4 year olds funding formulae.
 7. It is important to note that the proposed hourly funding rates at provider level for the 2 year olds and Under 2s are indicative and subject to final confirmation of the local authority level funding rates which are expected to be published by the DfE later in the Autumn term along with the 3-4 year old local authority level rates which have not yet been confirmed.
 8. All early years providers are encouraged to respond to this consultation using the [online survey](#). The deadline for responding to the consultation is 29 November 2023. The outcome of the consultation will be reported to Schools Forum at their next meeting on 17 January who will, after taking into consideration the consultation results, make a recommendation to Cabinet members who will decide on the final shape of the local early funding formulae for 2024/25 in February 2024.
 9. Early years providers can find further detailed information on the DfE's proposals for the funding the new entitlements at: <https://consult.education.gov.uk/funding-policy-unit/early-years-funding-extension-of-the-entitlements/>

Westmorland & Furness Proposed new 2 Year Olds and Under 2s Local Early Years Funding Formulae 2024/25

10. The DfE has provided local authorities with estimated numbers of part-time equivalent (PTEs) children that they anticipate will take-up the new entitlements to help them plan their budgets and shape their local funding formulae.
11. Currently, the local authority passes on the full hourly funding rate it receives for disadvantaged 2 year olds to early years providers. In 2024/25 local authority will be allowed to retain up to 5% of the new funding they receives for 2 Year Olds and Under 2s centrally with the support of their Schools Forum.

12. In considering the shape of the new funding formulae at provider level the local authority first needs to consider what level of funding is needed to support early years providers centrally and how much SENIF will be required. The remaining funding after taking these 2 factors into account is available for the new early years funding formulae for 2 Year Olds and Under 2s.
13. Consideration has been given to the additional resource and administration that will be associated with the roll out of the new free entitlements and, based on the principle that as much funding as possible should be passed directly onto early years providers with central spend kept at a minimum, it is proposed that £0.037m (split as £0.026m for 2 year olds and £0.010m for Under 2s) of the new funding is retained centrally to support the early years staffing team.

Consultation Question 1:

Local authorities are allowed to retain up to 5% of the new funding in 2024/25. Do you agree with your Schools Forum recommendation that the centrally retained funding for 2 year olds and Under 2s should be kept to a minimum to maximise the amount of the funding available to distribute to early years providers?

14. Currently, the SENIF budget for disadvantaged 2-year olds is £0.020m. Based on estimated take-up of the new free entitlements it is anticipated that £0.098m (split as £0.071m for 2 year olds and £0.027m for Under 2s) will be required. This has been calculated based on the estimated number of children taking up the new entitlements requiring SEN support multiplied by the current average hourly funding rate claimed of £3.04 x 15 hours x 38 weeks. It is estimated that 2.83% of total children taking up the new entitlements will access the fund and this has been based on the same percentage of children currently receiving support from the fund. It is proposed the current criteria for accessing SENIF and the 3 Levels of support based on need will remain the same as it is currently for the time being as follows:
 - Level one £1,000 (£1.75 per hour)
 - Level two £1,500 (£2.63 per hour)
 - Level three £2,000 (£3.51 per hour)
15. It is proposed that the new funding formulae for 2 Year Olds and Under 2s at provider level comprise of an hourly base rate and the mandatory deprivation supplement mirroring the current 3-4 year old funding formula (with the exception of the quality supplement which provides additional funding to school-based providers of early years provision that were in receipt of the former teacher pay and pension grants).
16. It is not proposed to use any of the other optional supplements available for local authorities to use which are as follows:
 - Flexibility: to support providers offering flexible provision for parents – e.g. out of hours / wraparound;

- **Rurality / Sparsity:** to enable local authorities to support providers serving rural areas less likely to benefit from economies of scale;
- **English as an additional language:** to recognise differences in attainment in the Early Years Foundation Stage between children whose first language is English, and those who have English as an additional language (EAL).

17. There are 2 main reasons why the use of the optional supplements is not proposed. Firstly, the hourly funding rate at local authority level does not reflect any additional funding in recognition of rurality or flexibility and secondly channelling funding through supplements reduces the hourly base rate for all providers as the funding available for the formula is a fixed amount.

Consultation Question 2:

Do you agree that the new funding formulae for 2 year olds and Under 2s should comprise of a base rate and the mandatory deprivation supplement only and not use the optional supplements?

18. The current deprivation supplement for the 3-4 year old funding formula is £0.21 per hour. It is allocated to providers based on eligible children using a combination of deprivation measures comprising of 60% ACORN, 20% IDACI and 20% IMD¹. In the 2022/23 academic year 13.37% of 3-4 year olds in the local authority attracted funding through this supplement.
19. It is proposed to use the same rate for the new 2 Year Old and Under 2s funding formulae but to change the methodology used to allocate the supplement to providers to target more disadvantaged children. It is proposed to allocate the supplement to providers using IDACI by allocating it to children whose postcodes are in the IDACI Bands A to F:

Band	Ranks	Description
A	1 to 821	Children in the most deprived 2.5% of LSOAs ²
B	822 to 2463	Children in the next most deprived 5% of LSOAs
C	2464 to 4105	Children in the next most deprived 5% of LSOAs
D	4106 to 5747	Children in the next most deprived 5% of LSOAs
E	5748 to 9032	Children in the next most deprived 10% of LSOAs
F	9033 to 12316	Children in the next most deprived 10% of LSOAs

²LSOA - Lower Layer Super Output Area

¹A Classification of Residential Neighbourhoods (ACORN), Income Deprivation Affecting Children Index (IDACI), Index of Multiple Deprivation (IMD)

20. This will target funding to those children living in the 37.5% most deprived areas. By using this new proposed methodology it is estimated that 19.54% of 3-4 year olds would attract funding through this supplement. It is estimated that the same proportion of children taking up the new free entitlements would attract funding through this supplement.

Consultation Question 3:

Do you agree that the deprivation supplement should be allocated to providers based on early years children accessing free entitlement living in IDACI bandings A to F instead of the current methodology for deprivation?

21. After taking into consideration the proposed centrally retained budgets, the SEN Inclusion fund and the estimated funding channelled through the deprivation supplement of £0.21 per hour the proposed base rate for the 2 Year Olds has been calculated as £6.93 and £9.45 for the Under 2s as summarised in the 2 tables below:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding *	%
Illustrative funding for 2024/25	1,442.75	£7.09	£5,830,586	100.00%
Proposed Centrally Retained Element:			£26,499	0.45%
Proposed SEN Inclusion Fund:	41	£3.04	£70,928	1.22%
	2.83%			
Funding Available for Formula:			£5,733,159	98.33%
<u>Proposed EYFF</u>				
Base Rate:	1,442.75	£6.93	£5,699,422	97.75%
Deprivation:	281.85	£0.21	£33,737	0.58%
	19.54%			
Total Early Years Formula Funding:			£5,733,159	98.33%

* total funding is calculated by taking the part-time Equivalents (PTEs) x hourly rate x 15 hours x 38 weeks

sf 011123 Proposed Early Years Funding Formula 2024/25 – Appendix 1

Under 2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding*	%
Estimated funding for 2024/25	560.76	£9.61	£3,071,675	100.00%
Proposed Centrally Retained Element:			£10,299	0.34%
Proposed SEN Inclusion Fund:	15.88	£3.04	£27,472	0.89%
	2.83%			
Funding Available for Formula:			£3,033,904	98.77%
<u>Proposed EYFF</u>				
Base Rate:	560.76	£9.45	£3,020,791	98.34%
Deprivation:	109.55	£0.21	£13,113	0.43%
	19.54%			
Total Early Years Formula Funding:			£3,033,904	98.77%
* total funding is calculated by taking the part-time Equivalents (PTEs) x hourly rate x 15 hours x 38 weeks				

22. For the Under 2s it should be noted that the modelling has been based on a full year impact however, the proposed funding rates will apply from September 2024 in line with the planned roll out of this phase.
23. For the 2 year olds, it is recognised that the proposed combined base rate of £6.93 plus the deprivation supplement of £0.21 which totals £7.14 is lower than the current funding rate that providers receive of £7.28 for disadvantaged 2 year olds (which comprises of a base rate £5.63 and early years supplementary grant of £1.65).
24. This is partly due to the new funding formula used by the DfE to calculate the local authority level funding rate which is based on a (national rate + additional needs) x area cost adjustment and funds both disadvantaged 2 year olds and working parents of 2 year olds whereas the current funding formula only funds disadvantaged 2 year olds.
25. Consideration has been given to increasing the deprivation supplement rate of £0.21 to a level that would uplift the combined base and deprivation rate to £7.28. However, as the funding available for the funding formula is a fixed amount the more funding allocated through the deprivation supplement the lower the amount of funding available for the base rate as the below example tables demonstrate:

Table 1 – Deprivation held at £0.21 per hour:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding *	%
<u>Proposed EYFF</u>				
Base Rate:	1,442.75	£6.93	£5,699,422	97.75%
Deprivation:	281.85	£0.21	£33,737	0.58%
	19.54%			
Total Early Years Formula Funding:			£5,733,159	98.33%

Table 2 – Impact on base rate of increasing Deprivation rate:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding *	%
<u>Proposed EYFF</u>				
Base Rate:	1,442.75	£6.90	£5,672,110	97.28%
Deprivation:	281.85	£0.38	£61,049	1.05%
	19.54%			
Total Early Years Formula Funding:			£5,733,159	98.33%

26. As shown in Table 2, the deprivation supplement would need to be set at £0.38 to achieve a combined rate of £7.28 but the base rate for all providers would reduce to £6.90 having a wider and significant impact on overall funding levels for all providers.
27. The impact of the proposed 2 year old base rate for the new free entitlement on those providers that currently charge parents has also been considered. The current hourly rates charged by providers to fee paying parents of 2 year olds varies but the average is in the region of £7.00 locally. Therefore, it is proposed to hold the deprivation rate at £0.21 to ensure that the base rate is as close to the average charged by providers as possible so that the impact of moving from fee paying to free entitlement is kept to a minimum.
28. In addition to the deprivation supplement additional funding to support disadvantaged children is available through the EYPP. The DfE have not yet announced the EYPP hourly rate for 2024/25 which local authorities are required to pass on to providers in full.

Consultation Question 4:

Do you agree that the deprivation supplement hourly funding rate should be fixed at £0.21 to maximise the base rate paid to providers?

29. The proposed new funding formulae hourly rates for 2 year olds and Under 2s are indicative only and are subject to final confirmation of the local level hourly funding rates which are expected to be published later in the Autumn term along with the 3-4 year old funding rates.
30. The indicative funding rates assume a standard 190 term days in the financial year (April to March), however, early years providers will continue to be funded based on the actual numbers of term days which can be higher or lower than 190 days each financial year.

Areas not impacted by this Consultation

31. It should be noted that the following funding streams are not impacted by this consultation:

- Mainstream Schools Reception to Year 11 funding
- Special School and Pupil Referral Units
- Post 16 Education
- Other government grants including Pupil Premium, Universal Infant Free School Meals, Primary Sport & PE grant.

Responding to the Consultation

24. Early years providers are invited to respond to the 4 questions in this consultation using the [online survey](#) by **Wednesday 29 November 2023**. Returns submitted after this date will not be included.

25. We encourage every early years provider to respond. We kindly ask that there is only one response per provider.

WESTMORLAND & FURNESS COUNCIL SCHOOLS FORUM
Report Title: High Needs Budget Monitoring Q1
Meeting date: 1 November 2023
Report of: Mil Vasic, Director Children's Services

1.0 Executive Summary

- 1.1 This report presents the High Needs (HN) Block deficit position as at 1 June 2023 which is forecast to be £17.180m as at 31 March 2024, an increase of £5.162m compared to the closing deficit at the end of financial year 2022/23 of £12.017m.

2.0 Link to Council Plan Priorities

- 2.1 The utilisation of the HN Block within the Dedicated Schools Grant (DSG) is supportive of the Council Plan priorities that "People in Westmorland and Furness are healthy, happy, active and able to lead fulfilling independent lives, thriving in their communities" and the commitment to reduce inequality and "ensure that young people have enough opportunities to access the best education".

3.0 Recommendation

- 3.1 The Schools Forum are recommended to note the current projection on the HN budget as at 1 June 2023.

4.0 Rationale and Evidence for the Recommendation

- 4.1 A balanced High Needs budget has been set for 2023/24 with no planned transfer to or from reserves. The initial budget available for the HN Block, after academy recoupment, was £25.944m based on the provisional HN Block allocation from central government as confirmed in December 2022. There were no transfers from the Schools Block.

Budget Revisions

- 4.2 Since the initial budget was set the HN block allocation has been updated to reflect adjusted recoupment for HN places as shown in the table below:

	2023/24
	£m
High Needs allocation before recoupment for place funding in academies and FE institutions	27.640
Less recoupment for high needs places in academies and FE institutions	(1.696)
Initial Budget	25.944
DfE Recoupment adjustment for HN places AY 2023/24	(0.101)
Total High Needs Budget Q1	25.843

Projected Outturn

- 4.3 Performance against the High Needs Block budget is monitored monthly with reports presented to senior management and to Cabinet on a quarterly basis, as well as to each Schools Forum meeting.
- 4.4 The table below presents the projection against the budget as at Q1. This shows that the budget is projected to overspend by £5.162m at 31 March 2024:

Description	Budget	Forecast	Variance
	£m	£m	£m
Special Schools - High Needs	6.920	7.002	0.081
Schools -Resourced Provision	0.358	0.370	0.012
Independent & Other Placements	4.740	7.280	2.540
Central SEN (Equipment, BVI, Audio etc)	0.031	(0.015)	(0.047)
SEND Residential Placements	1.792	1.701	(0.091)
High Needs - Invest to Save	0.000	0.276	0.276
High Needs - Post 16 ISPs	1.019	1.019	0.000
High Needs - Post 16 FE	0.699	0.699	0.000
High Needs - Top Up	6.699	9.090	2.391
Virtual School (CLA Inclusion)	0.149	0.149	0.000
Inclusion Teams	1.177	1.177	0.000
PRU Budget	2.229	2.229	0.000
Mobility and Independence Contract	0.008	0.008	0.000
Share of de-delegated (special schools)	0.020	0.020	0.000
Total DSG to transfer to DSG HNB reserve	25.843	31.005	5.162

- 4.5 Special Schools £0.081m. The pressure relates to new and amendments to EHCP top-ups since the start of the year.
- 4.6 Independent Specialist Placements (ISPs) & Other Placements £2.540m. The forecast is based on current and known new day ISPs coming through the system. The forecast expenditure for day ISPs is predicted to be £5.715m. The overall number of ISPs has increased by 1 from 88 to 89 as at Q1 and the average full year cost of a day ISP is £65,238 as at Q1. There have been 2 new placements and one ended placement since March 2023. Also included within this budget line is forecast EHCP top-ups for children placed in Cumberland schools of £0.482m, children placed in other local authorities of

£0.150m and forecast costs associated with children being educated other than at a school (EOTAS) of £0.932m.

4.7 Residential placements (£0.091m). The forecast is based on current and known new placements. The overall number of residential placements as at Q1 is 24. Since March 2023 there have been 2 new placements and 2 ended placements. The average full year cost of a residential placement is £71,244 as at Q1.

4.8 The below table summarises the number of pupils in ISPs by provider type:

Number of Children and Young People with EHCPs in Independent Special Placements 2023/24

Placement Type	Number of Children						Total Change	2023/24 Q1	2023/24 Forecast Spend £m	Average Annual Cost of Placements		
	2022/23 Outturn	New	Ended	Placement Changes		2023/24				2023/24	£	2022/23
				In	Out							
ISP - Day	88	2	-1			1	89	5.715	65,238	65,613		
ISP - Residential	24	2	-2			0	24	1.677	71,244	85,258		
ISP - FE Colleges	38					0	38	1.019	tbc	42,244		
Total	150	4	-3	0	0	1	151	8.411				

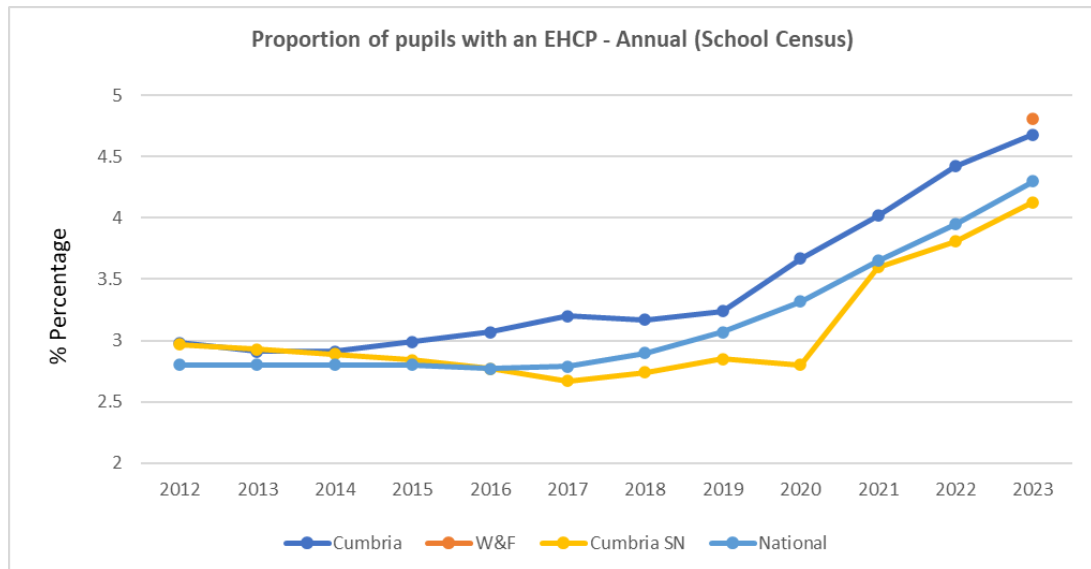
4.9 High Needs Invest to Save Initiatives £0.276m. The forecast expenditure here relates to the Sandgate School Early Intervention and Greengate Junior School Alternative Provision programmes. The forecast is net of re-charge for the leadership provided by Sandgate School for the two Hub schools in Cumberland of £0.031m.

4.10 EHCP top-ups for pupils in mainstream schools and Early Years Providers £2.391m. The forecast is based on current EHCP costs and predicted number of new and amended EHCPs in-year. Since the start of the year there have been new and amendments to existing EHCPs of £0.702m, payments to PVIs of £0.077m, and forecasted new EHCPs based on known children coming through the system totalling £0.649m. The forecast also includes the additional net cost of restoring the notional SEN to £6,000 after removing the Targeted SEN funding with effect from September 2021 of £0.262m and pre-existing budget pressures of £0.701m.

4.11 The remaining balance relates to individually non-material variances totalling a net underspend of (£0.034m).

4.12 The pressure against the High Needs Block continues to be due to specific budget pressures relating to the growth in demand for Education Health Care Plans (EHCPs) for children and young people with SEN. The number of children with EHCPs as Q1 is 2,015. This figure is provisional pending the completion of the disaggregation of cases between the two new authorities.

4.13 The benchmarking chart below shows that Westmorland & Furness' percentage of pupils with EHCPs is higher compared to the national and Cumbria statistical neighbours rates although the rate of increase for Cumbria overall is largely matched by the rate of increase both nationally and against our statistical neighbours:



4.14 In 2023/24 local authorities have seen an increase in their High Needs Block funding of at least 5% per head of population and additional High Needs funding to reflect likely cost increases for local authorities and schools of £1.127m resulting in total funding of £25.843m as at Q1 after deductions for directed funding of high needs places by the ESFA. However, 29% of the total allocation is still based on historic 2017/18 actual spend. There has been no transfer of funding from the Schools Block to High Needs Block in 2023/24. Cumbria took part in the Department for Education’s Delivering Better Value for SEND programme and successfully applied and received approval for a £1m grant for each new authority to support their improvement plans the impact of which will be incorporated into Westmorland & Furness’ DSG management plan in due course.

5.0 Options

5.1 The Schools Forum is recommended to note the current projection against the High Needs Block budget.

6.0 Financial and Other Relevant Implications

6.1 Resource and value for money implications are considered throughout this report. No equality/legal/ implications have been identified.

25 October 2023

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Westmorland & Furness Schools Forum

Forward Plan

WORKING COPY. If additional agenda items are required, please contact the clerk at least 3 weeks in advance of the next meeting.

Meeting details	Item
17 October 2023, 9.30-11am TRAINING SESSION Scafell Pike, South Lakeland House, Kendal	Funding Formula
1 November 2023, 9.30-11.30am MS Teams Apologies from: Guests:	<ol style="list-style-type: none"> 1) Appointment of Vice-Chair 2) School Funding Formula – consultation outcome 3) Early Years Funding Formula 4) Maintained Schools De-delegated budgets 5) HN Budget Monitoring Q1 6) Schools De-delegated Contingency Budget Monitoring Q1 7) Delivering Better Value for SEND update (carried forward from 20 September) 8) Working Groups to be a standing agenda item to consider whether any need has arisen. 9)

Meeting details	Item
<p>17 January 2023, 9.30-11.30am MS Teams</p> <p>Apologies from:</p> <p>Guests:</p> <ul style="list-style-type: none"> 1) DSG - School Budgets 2024-25 2) DSG – Other Blocks 2024-25 3) Growth Fund 2024-25 4) Maintained School Balances 5) Working Groups to be a standing agenda item to consider whether any need has arisen. 6) 	
Next meeting date TBC	

Items to be scheduled: **Amanda Chew to consider options for the Excess Surplus Balance Policy, to be revisited at a future meeting**