

**Waltham Forest Council**

# Special Schools Forum Stage 1 National Funding Formula Consultation Closing 17 April 2016

Wednesday 23 March



# AGENDA

1. Schools National Funding Formula consultation
2. High Needs National Funding Formula consultation

Waltham Forest Council



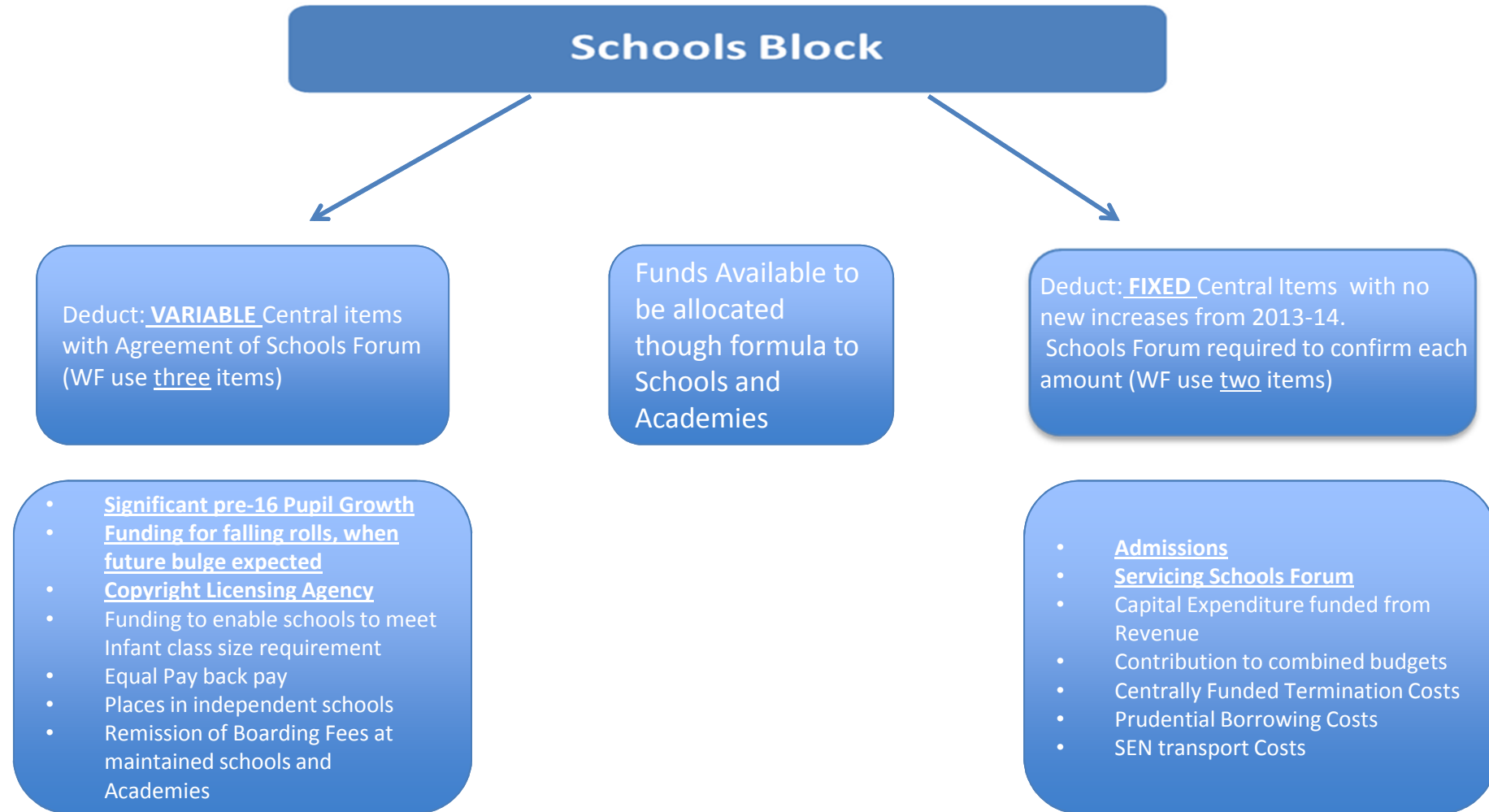
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EYUF x NOR  
=  
£14.836m

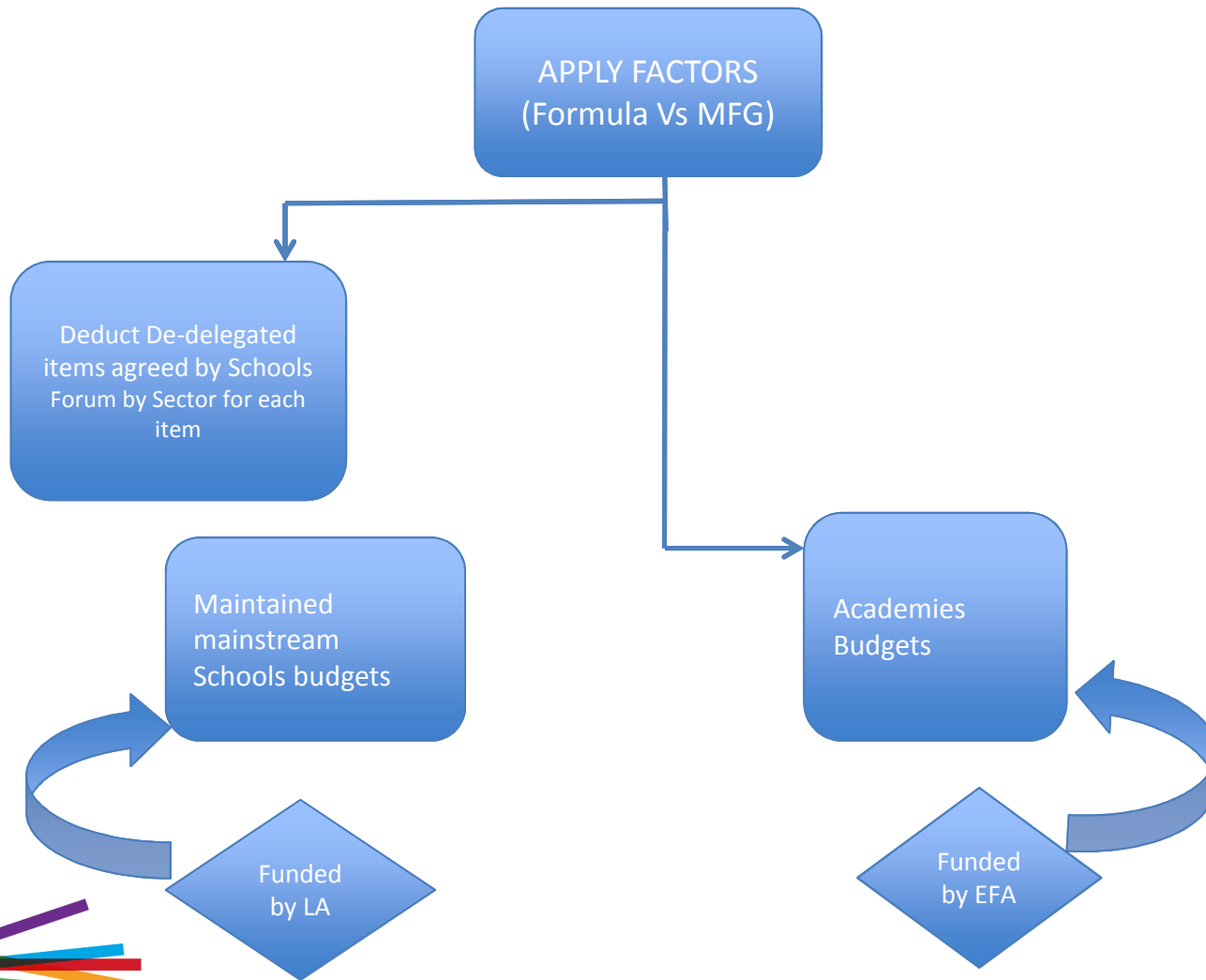
SBUF x NOR=  
£192.351m

Place led funding  
+Top up=  
£34.233m

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# Funds Available for allocating through formula after deduction for central items



## Schools Block Factors -5 to 16 Year Olds

	Rate Primary	Rate Secondary
<b>Pupil Led (per Pupil)</b>		
Basic Entitlement: AWPU (Mandatory)	3,440.00	4,760.00
<b>Deprivation (Mandatory to use FSM and / or IDACI)</b>		
FSM	600.00	1,180.00
IDACI 4	200.00	400.00
IDACI 5	500.00	1,000.00
IDACI 6	750.00	1,500.00
<b>Additional Needs</b>		
English as an Additional Language	800.00	800.00
Mobility	1,000.00	1,000.00
Prior Attainment	600.00	600.00
<b>Per School</b>		
Lump Sum	90,000.00	125,000.00
<b>Site Specific</b>		
Split Sites		
Rates		
PFI		
<b>Not used in Waltham Forest</b>		
Looked After Children		
Sparcity		
London Fringe		

### Schools Block Distribution

	Primary £	Secondary £	Total £	% of All Block	London	Neighbours
<b>Basic Entitlement</b>	<b>81,890,920</b>	<b>62,057,691</b>	<b>143,948,611</b>	<b>74.96%</b>	<b>75.87%</b>	<b>74.36%</b>
			-			
FSM	4,776,996	6,549,564	11,326,560	5.90%	5.95%	6.96%
IDACI	3,667,641	4,537,092	10,783,055	5.62%	3.17%	4.17%
<b>Deprivation</b>	<b>8,444,637</b>	<b>11,086,656</b>	<b>22,109,615</b>	<b>11.51%</b>	<b>9.12%</b>	<b>11.12%</b>
			-			
LAC	-	-	-	0.00%	0.05%	0.07%
EAL	6,303,364	821,674	7,125,038	3.71%	1.97%	2.10%
Mobility	453,639	100,800	554,439	0.29%	0.20%	0.19%
Prior attainment	2,970,077	2,075,319	5,045,396	2.63%	4.56%	4.17%
<b>Additional Needs</b>	<b>9,727,080</b>	<b>2,997,793</b>	<b>12,724,873</b>	<b>6.63%</b>	<b>6.78%</b>	<b>6.51%</b>
SubTotal Pupil-Led (Must be at least 80%)	100,062,637	76,142,140	178,783,099	93.10%	91.78%	92.00%
Lump sum	4,608,791	2,016,209	6,625,000	3.45%	5.94%	5.66%
Split sites	243,061	501,939	745,000	0.39%	0.13%	0.20%
Rates	1,516,285	1,667,292	3,183,577	1.66%	1.24%	1.16%
PFI	1,427,902	1,275,131	2,703,034	1.41%	0.22%	0.26%
<b>Site Specific</b>	<b>7,796,039</b>	<b>5,460,571</b>	<b>13,256,611</b>	<b>6.90%</b>	<b>7.53%</b>	<b>7.28%</b>
Sixth Form	-	-	-	0.00%	0.08%	0.18%
Exceptional Circumstances	-	-	-	0.00%	0.02%	0.03%
Minimum Funding Guarantee	-	-	-	0.00%	0.60%	0.52%
Balance					-0.01%	
<b>TOTAL</b>	<b>107,858,676</b>	<b>81,602,711</b>	<b>192,039,710</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>



### Use of Factors: London

	London	FSM	IDACI 1	IDACI 2	IDACI 3	IDACI 4	IDACI 5	IDACI 6	LAC	EAL	Mobility	Prior Attainment
√	Use	29	12	13	15	22	24	24	20	31	22	31
√	Use %	91%	38%	41%	47%	69%	75%	75%	63%	97%	69%	97%
X	Do not use	3	20	19	17	10	8	8	12	1	10	1
X	Do not use %	9%	63%	59%	53%	31%	25%	25%	38%	3%	31%	3%

Waltham Forest	√	X	X	X	√	√	√	X	√	√	√	
<b>Waltham Forest</b>	<b>Agrees with majority of London boroughs except for not using LAC (20/32 use it)</b>											

FSM	3/32: Brent, Hackney and Newham do not use
EAL	1/32: Newham does not use
Prior Attainment	1/32: Barnet does not use

### Use of Factors: Neighbours

Neighbours	FSM	IDACI 1	IDACI 2	IDACI 3	IDACI 4	IDACI 5	IDACI 6	LAC	EAL	Mobility	Prior Attainment
Birmingham	√	X	X	X	√	√	√	√	√	√	√
Brent	X	√	√	√	√	√	√	√	√	X	√
Croydon	√	√	√	√	√	√	√	√	√	√	√
Enfield	√	X	X	X	√	√	√	√	√	√	√
Greenwich	√	X	X	X	X	X	X	√	√	√	√
Hackney	X	√	√	√	√	√	√	√	√	√	√
Haringey	√	√	√	√	√	√	√	√	√	√	√
Lewisham	√	√	√	√	√	√	√	X	√	√	√
Luton	√	√	√	√	√	√	√	√	√	√	√
<b>Waltham Forest</b>	√	<b>X</b>	<b>X</b>	<b>X</b>	√	√	√	<b>X</b>	√	√	√

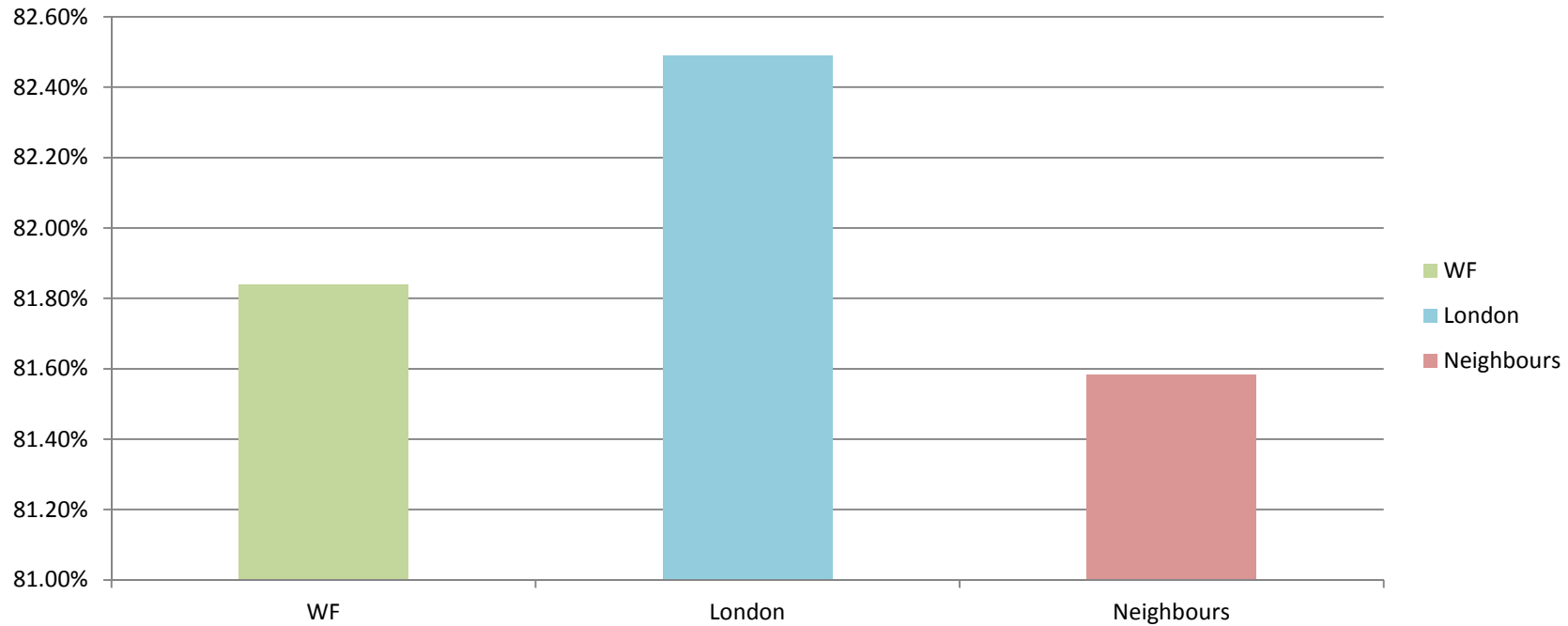
√	Use	8	6	6	6	9	9	9	8	10	9	10
X	Do not use	2	4	4	4	1	1	1	2	0	1	0

**Waltham Forest** *Agrees with majority of Neighbours except for not using IDACI 1-3 (6/10 use it) or LAC (8/10 use it)*

<b>FSM</b>	<i>2/10: Brent and Hackney do not use</i>
<b>IDACI 1-3</b>	<i>4/10: Birmingham, Enfield, Greenwich and <b>Waltham Forest</b> do not use</i>
<b>IDACI 4-6</b>	<i>1/10: Greenwich does not use</i>
<b>LAC</b>	<i>2/10: Lewisham and <b>Waltham Forest</b> do not use</i>
<b>Mobility</b>	<i>1/10: Brent does not use</i>

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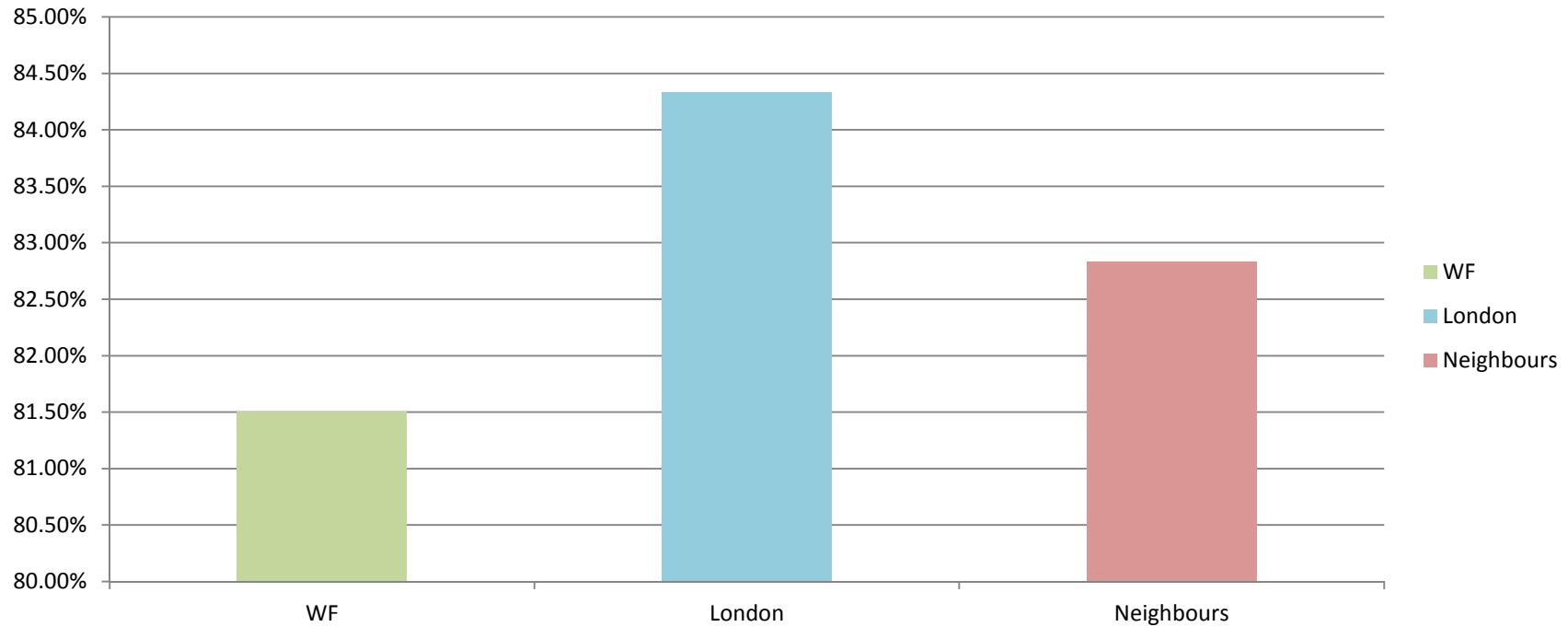
### Primary AWPUs funding



WF	London	Rank in London	Neighbours	Rank in Neighbours
81.84%	82.49%	20/32	81.58%	4/10

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### Secondary AWPUs funding



WF	London	Rank in London	Neighbours	Rank in Neighbours
81.50%	84.34%	22/32	82.84%	6/10

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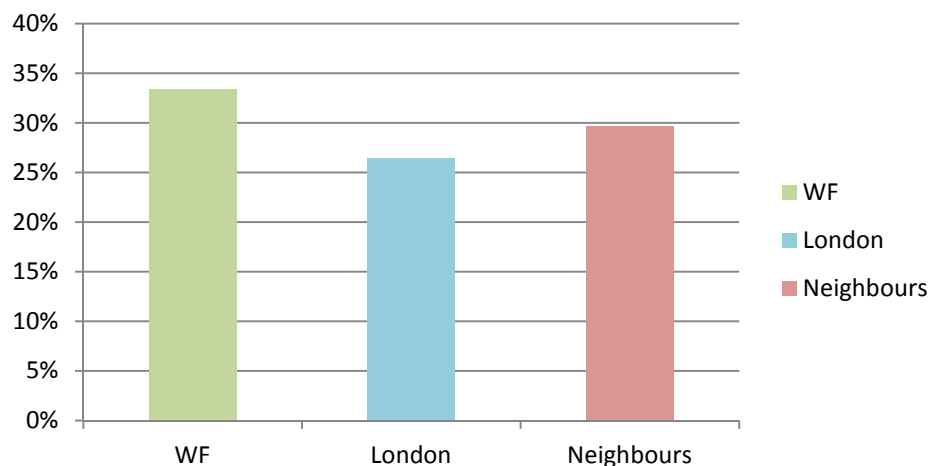
Deprivation: Free School Meals

Primary	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary FSM pupils	33.44%	26.45%	10/32	29.68%	5/10
Primary FSM Funding	4.77%	6.36%	20/32	8.21%	8/10

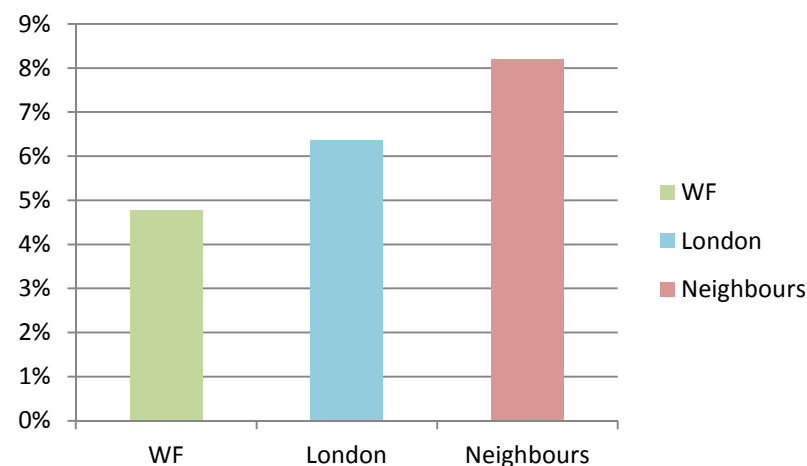
Above London average FSM pupils.  
Below London average FSM funding

Above Neighbour average FSM pupils.  
Below Neighbour average FSM funding

Primary FSM pupils



Primary FSM Funding



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Secondary

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Secondary FSM pupils	42.57%	30.75%	11/32	29.24%	4/10
Secondary FSM Funding	8.60%	6.82%	10/32	7.82%	5/10

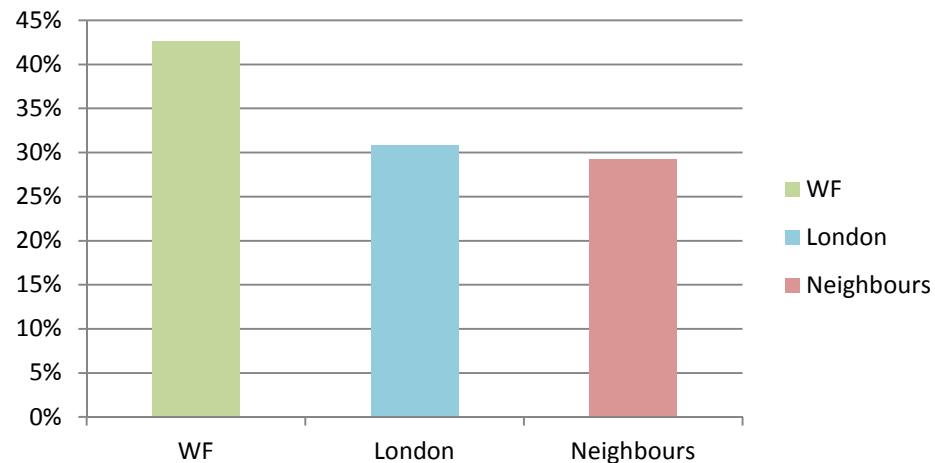
*Above London average FSM pupils.*

*Above London average FSM funding.*

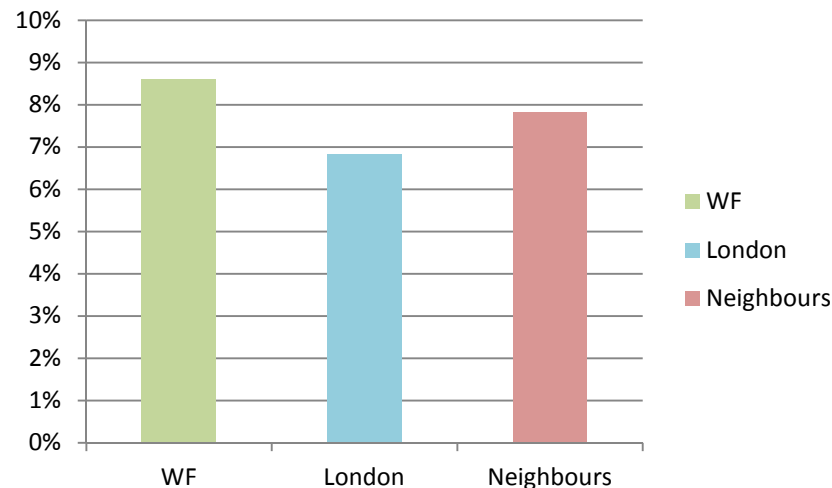
*Above Neighbour average FSM pupils*

*Above Neighbour average FSM funding.*

Secondary FSM pupils



Secondary FSM Funding



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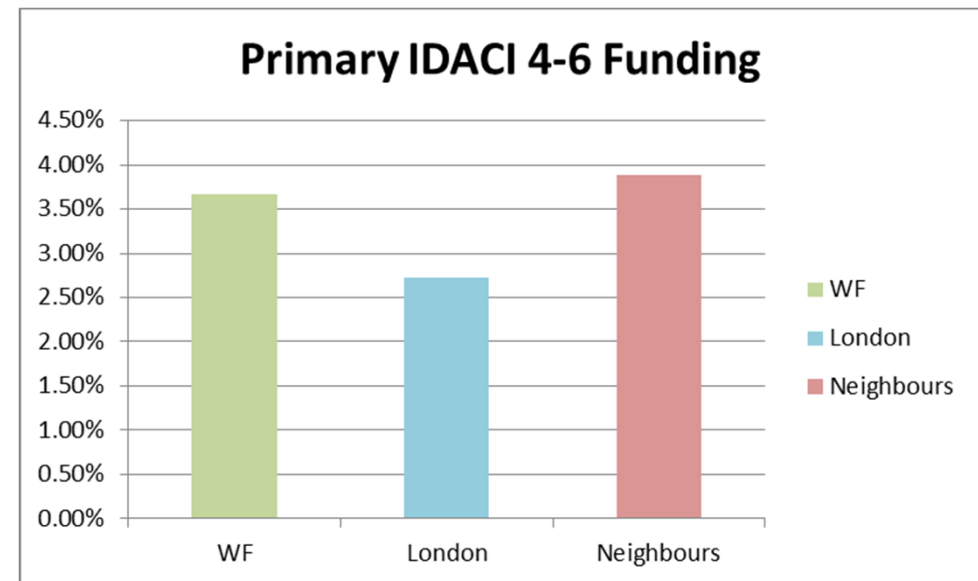
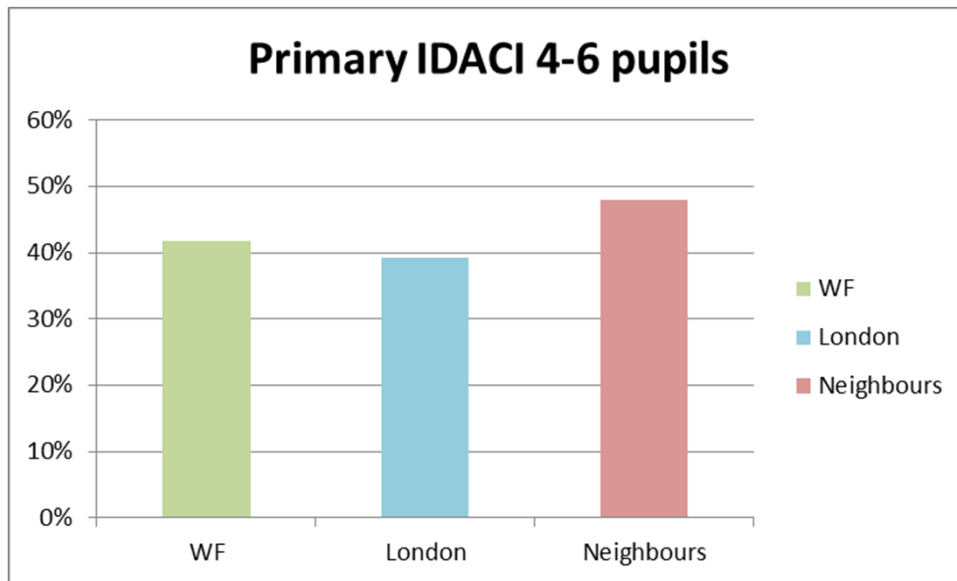
Deprivation: IDACI 4-6

Primary

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary IDACI 4-6 pupils	41.76%	39.19%	16/32	47.98%	7/10
Primary IDACI 4-6 Funding	3.67%	2.73%	10/32	3.89%	5/10

*Above London average IDACI 4-6 pupils*  
*Above London average IDACI 4-6 funding*

*Below Neighbour average IDACI 4-6 pupils*  
*Above Neighbour average IDACI 4-6 funding*



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Deprivation: IDACI 4-6

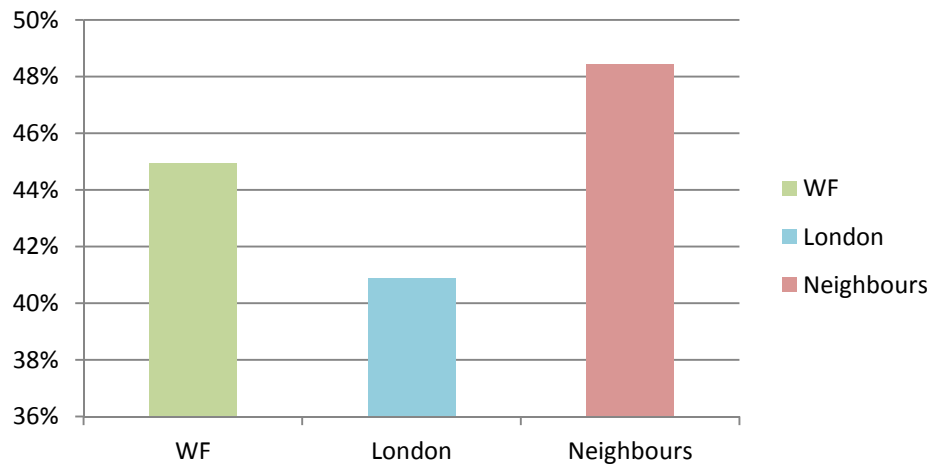
Secondary

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Secondary IDACI 4-6 pupils	44.94%	40.91%	13/32	48.44%	5/10
Secondary IDACI 4-6 Funding	5.96%	2.72%	6/32	3.50%	3/10

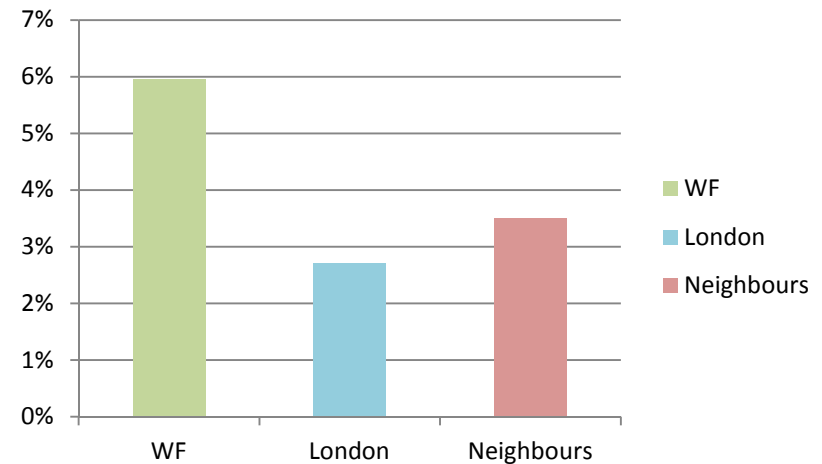
*Above London average IDACI 4-6 pupils  
Above London average IDACI 4-6 funding*

*Below Neighbour average IDACI 4-6 pupils  
Above Neighbour average IDACI 4-6 funding*

Secondary IDACI 4-6 pupils



Secondary IDACI 4-6 Funding





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**Additional Needs - EAL**

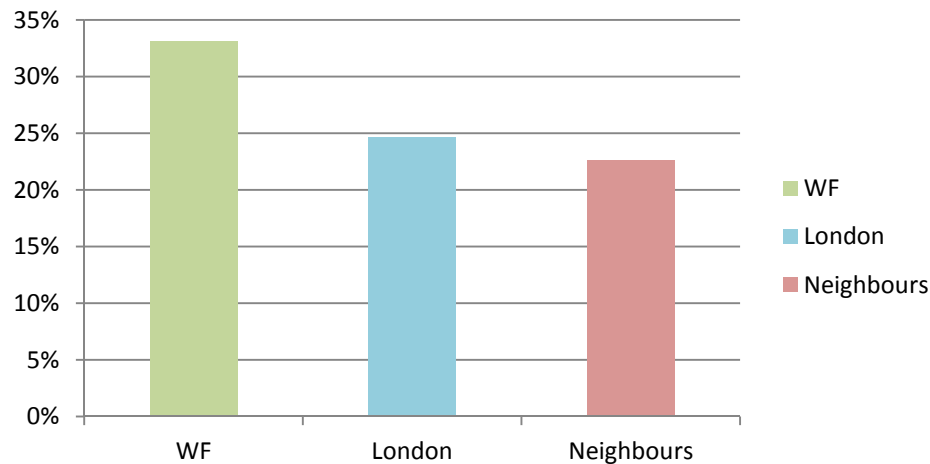
**Primary**

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary EAL pupils	33.10%	24.63%	8/32	22.62%	2/10
Primary EAL 3 Funding	6.30%	2.95%	2/32	2.62%	1/10

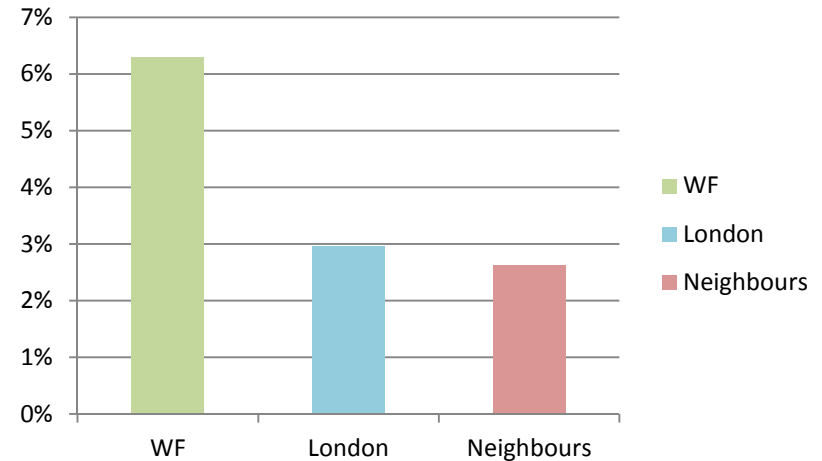
*Above London average EAL pupils  
Above London average EAL funding*

*Above Neighbour average EAL pupils  
Above Neighbour average EAL funding*

**Primary EAL pupils**



**Primary EAL 3 Funding**



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Additional Needs - EAL

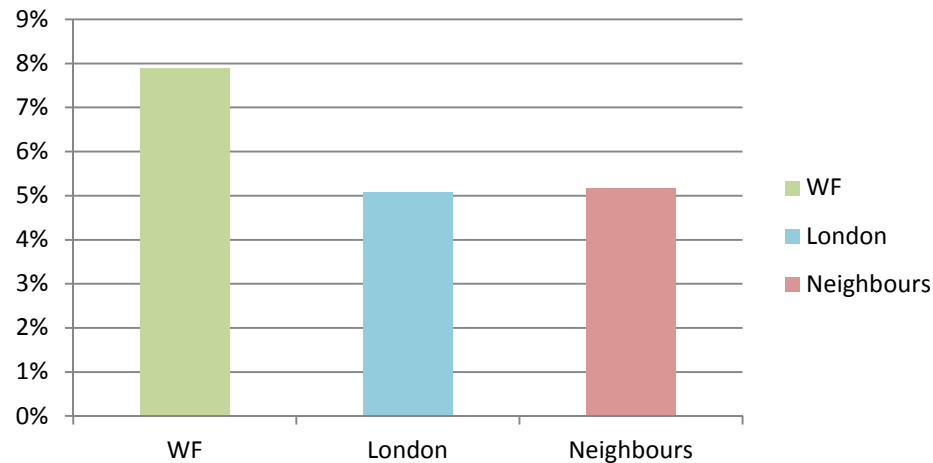
Secondary

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Secondary EAL pupils	7.88%	5.06%	4/32	5.18%	2/10
Secondary EAL 3 Funding	1.08%	1.19%	16/32	1.07%	6/10

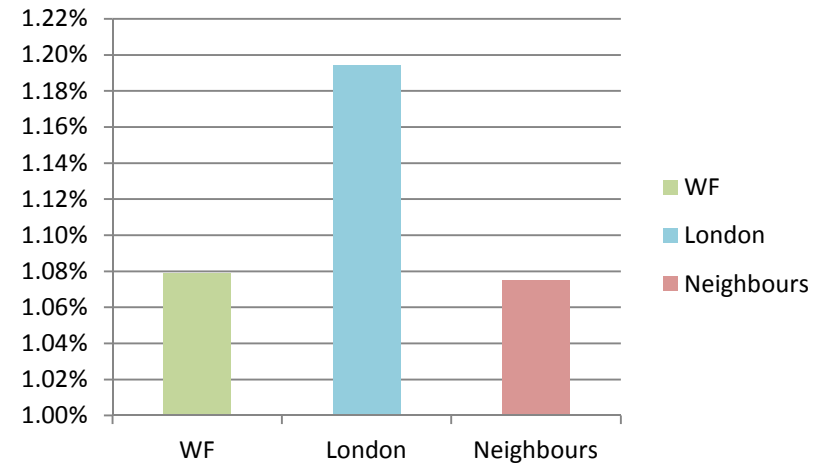
*Above London average EAL pupils.  
Below London average EAL funding.*

*Above Neighbour average EAL pupils  
Above Neighbour average EAL funding.*

Secondary EAL pupils



Secondary EAL 3 Funding



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Additional Needs - Mobility

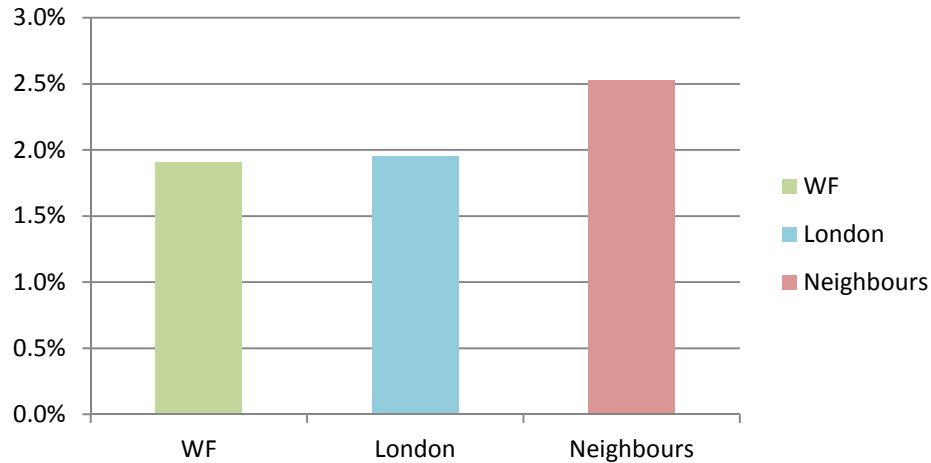
Primary

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary Mobility pupils	1.91%	1.95%	13/32	2.53%	7/10
Primary Mobility Funding	0.45%	0.33%	9/32	0.38%	3/10

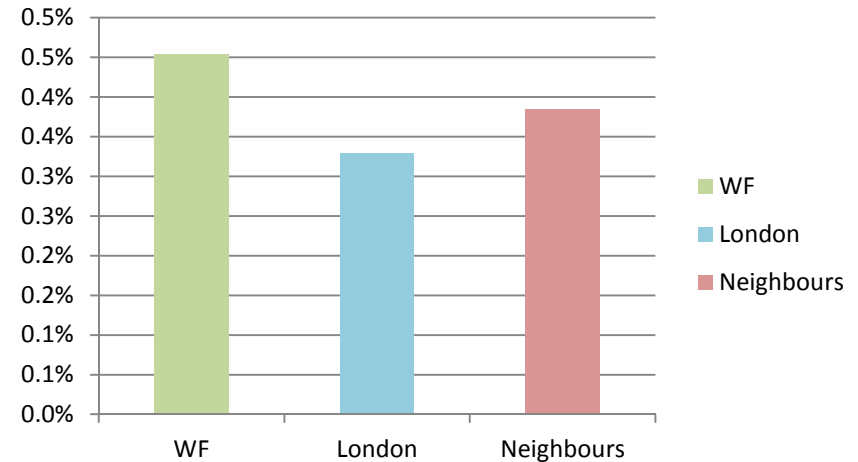
*Below London average Mobility pupils.  
Above London average Mobility funding*

*Below Neighbour average Mobility pupils.  
Above Neighbour average Mobility funding*

Primary Mobility pupils



Primary Mobility Funding



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Additional Needs - Mobility

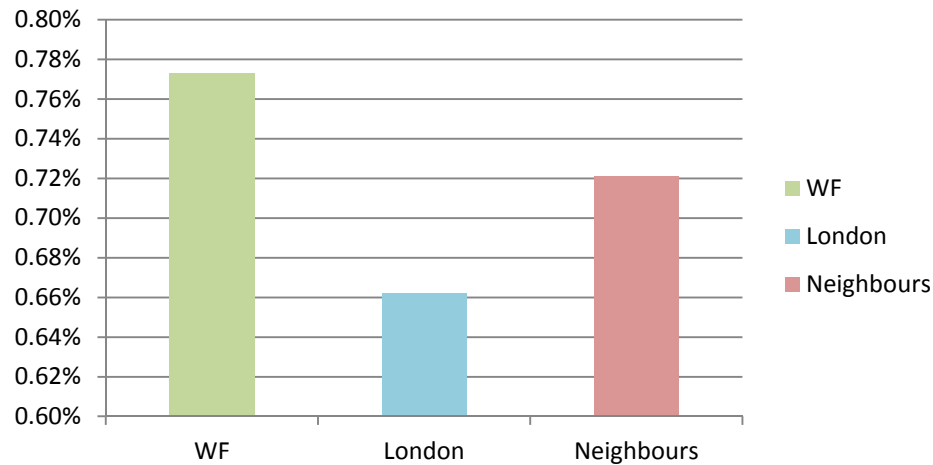
Secondary

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Secondary Mobility pupils	0.77%	0.66%	12/32	0.72%	3/10
Secondary Mobility Funding	0.13%	0.08%	7/32	0.10%	3/10

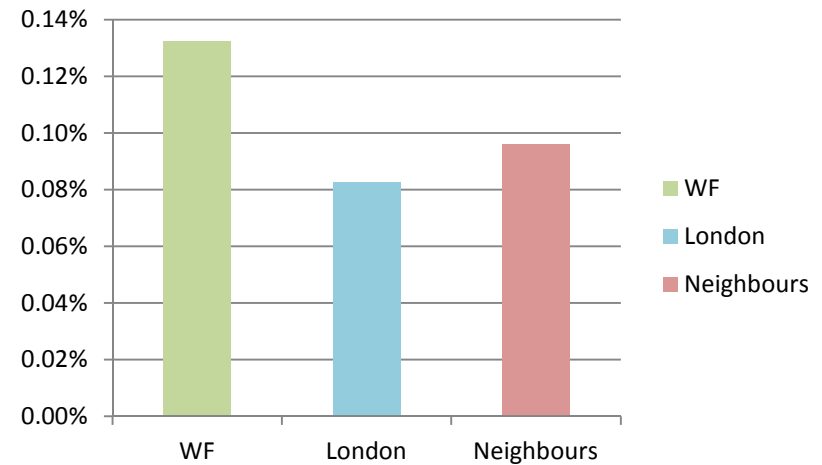
*Above London average Mobility pupils.  
Above London average Mobility funding*

*Above Neighbour average Mobility pupils  
Above Neighbour average Mobility funding*

Secondary Mobility pupils



Secondary Mobility Funding



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Additional Needs - Prior Attainment

Primary

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary Prior attainment pupils	20.79%	22.90%	22/32	24.50%	8/10
Primary Prior attainment Funding	2.97%	5.15%	26/32	5.94%	7/10

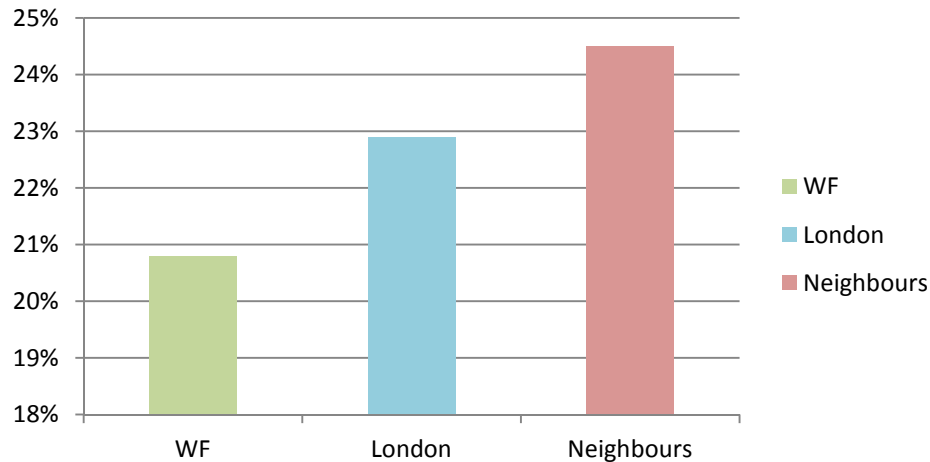
*Below London average Prior Attainment pupils.*

*Below London average Prior Attainment funding*

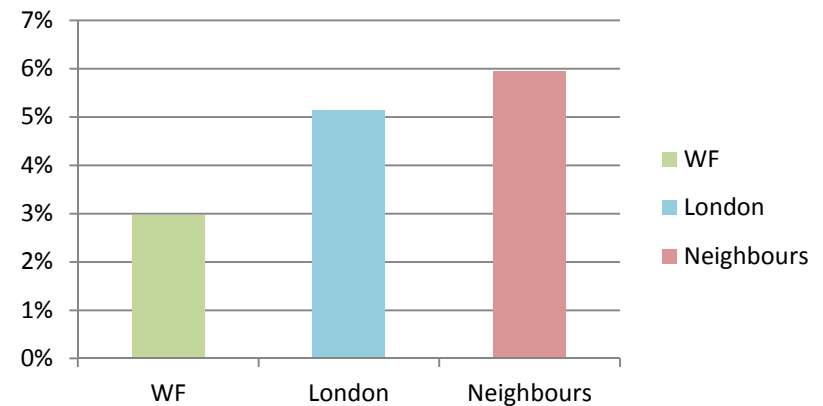
*Below Neighbour average Prior Attainment pupils*

*Below Neighbour average Prior Attainment funding*

Primary Prior attainment pupils



Primary Prior attainment Funding



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**Additional Needs - Prior Attainment**

**Secondary**

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Prior attainment pupils	26.53%	21.88%	3/32	25.29%	3/10
Prior attainment Funding	2.73%	4.85%	26/32	4.67%	8/10

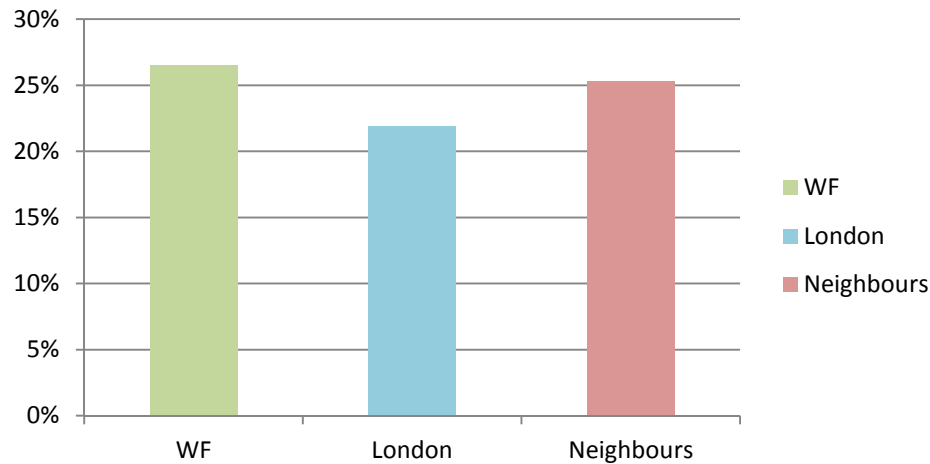
*Above London average Prior Attainment pupils*

*Below London average Prior Attainment funding*

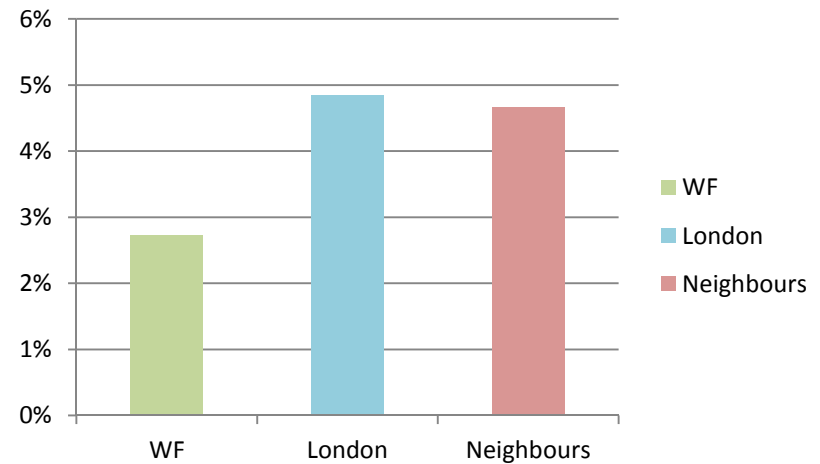
*Above Neighbour average Prior Attainment pupils*

*Below Neighbour average Prior Attainment funding*

**Secondary Prior attainment pupils**



**Sec. Prior attainment Funding**



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**LUMP SUM**

**Context**

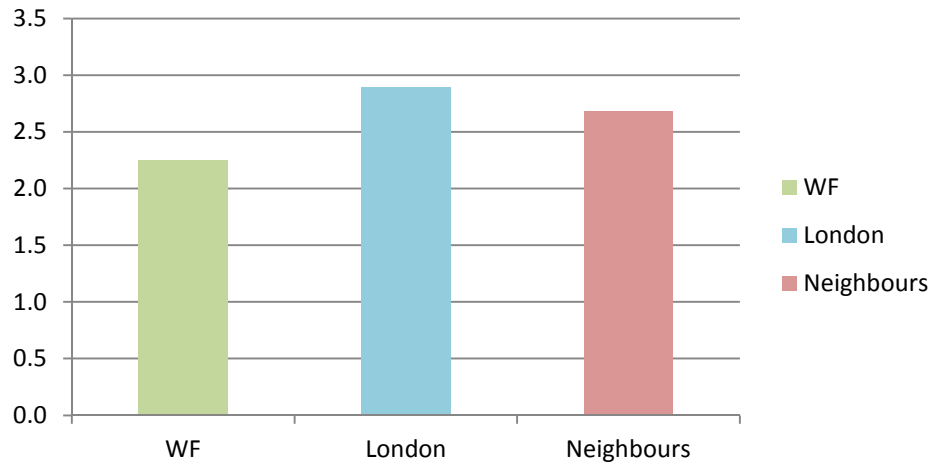
	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary schools per 1000 pupils	2.25	2.89	29/32	2.69	10/10
Primary schools per 1000 places	1.98	2.64	30/32	2.46	10/10

Primaries are larger:

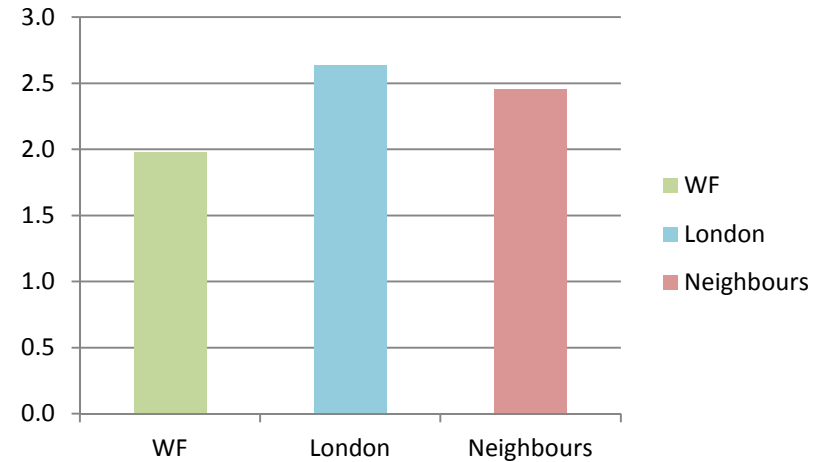
Below London average for school per 1000

Below Neighbour average for schools /1000

**Primary schools per 1000 pupils**



**Primary schools per 1000 places**



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**LUMP SUM**

**Context**

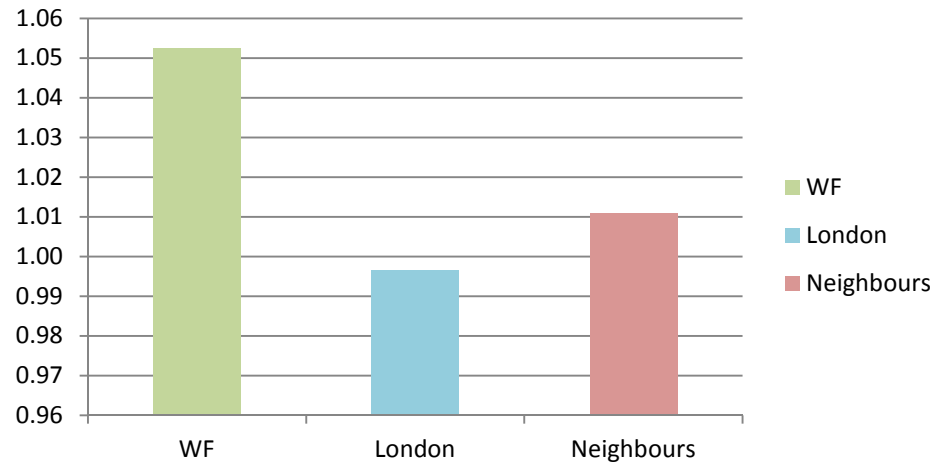
	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Secondary schools per 1000 pupils	1.05	1.00	11/32	1.01	4/10
Secondary schools per 1000 places	0.98	0.86	8/32	0.87	3/10

Secondaries are smaller:

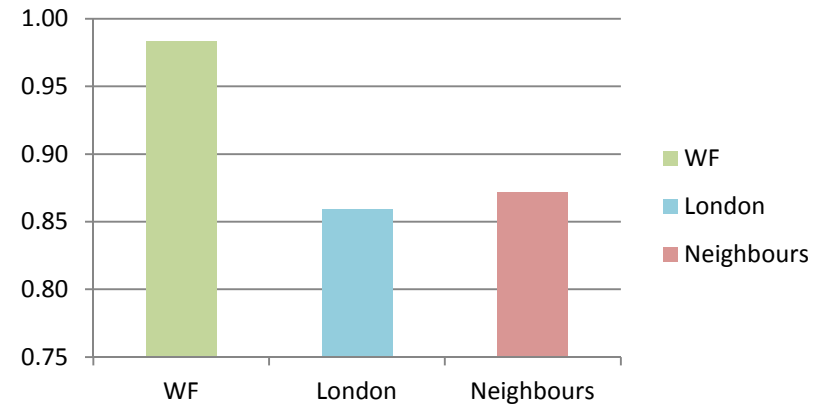
Above London average for school per 1000

Above Neighbour average for schools per 1000

**Secondary schools per 1000 pupils**



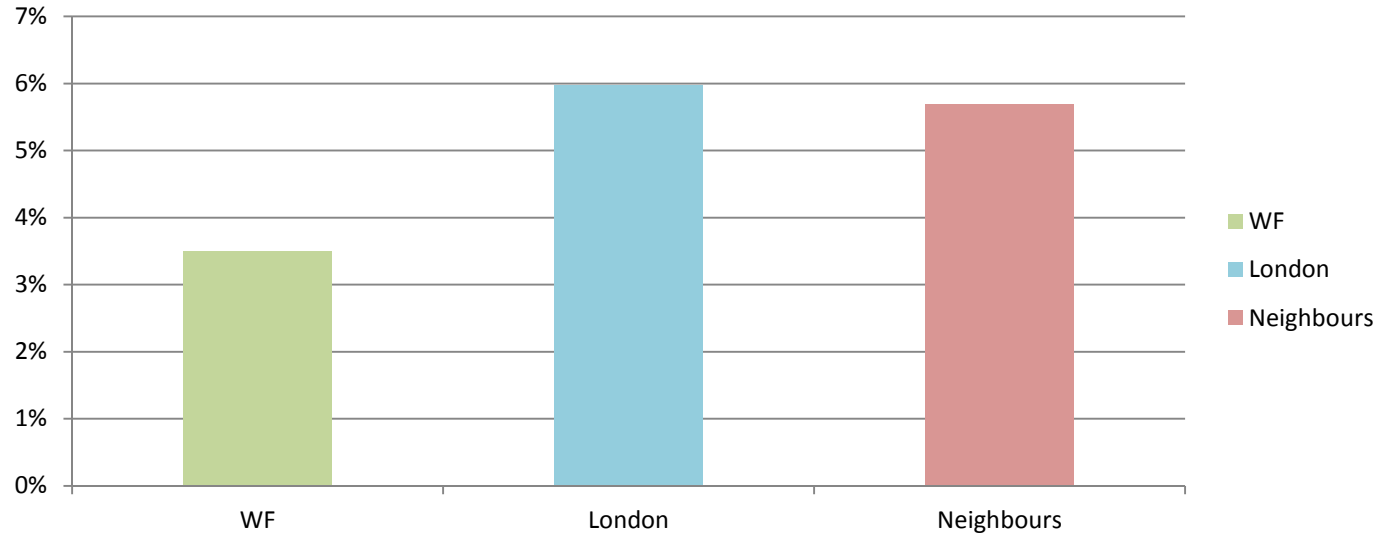
**Secondary schools per 1000 places**





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### Lump sum Proportion



### LUMP SUM - Comparisons

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Lump sum Proportion	3.50%	5.97%	31/32	5.69%	10/10
Amount allocated to each Secondary	£125,000	£138,801	21/32	£136,825	7/10
Amount allocated to each Primary	£90,000	£141,752	32/32	£145,425	10/10

Lump Sum as proportion of funding:

Secondary Lump Sum amount:

Primary Lump Sum amount:

*Below London average*

*Below London average*

*Below London average*

*Below Neighbour average*

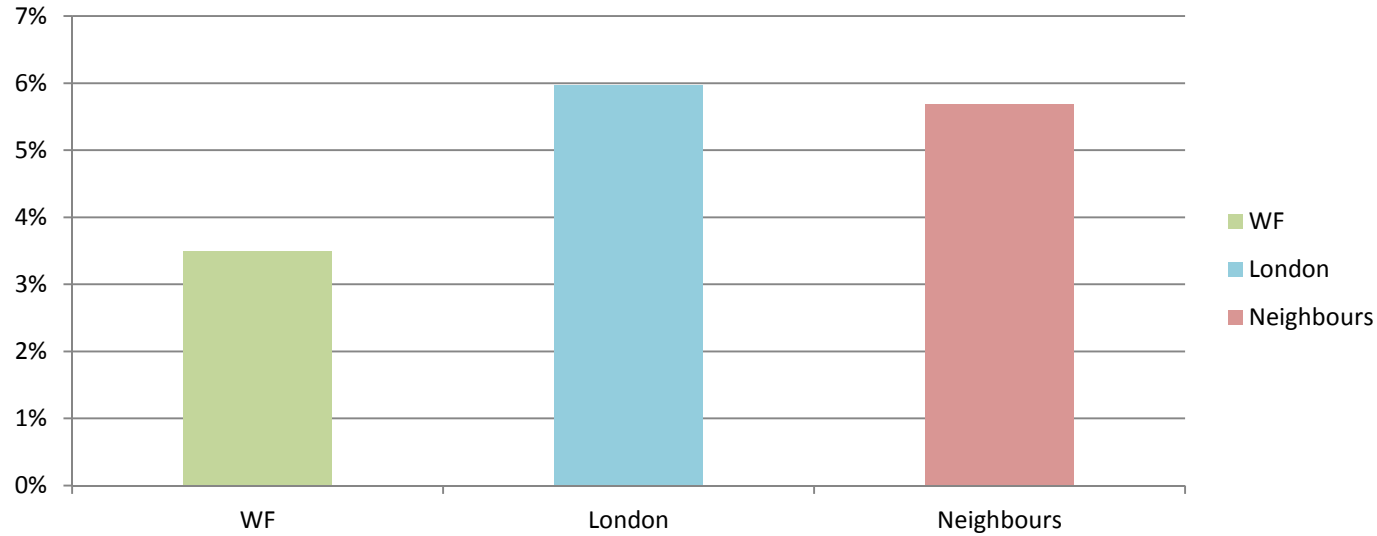
*Below Neighbour average*

*Below Neighbour average*



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### Lump Sum Proportion

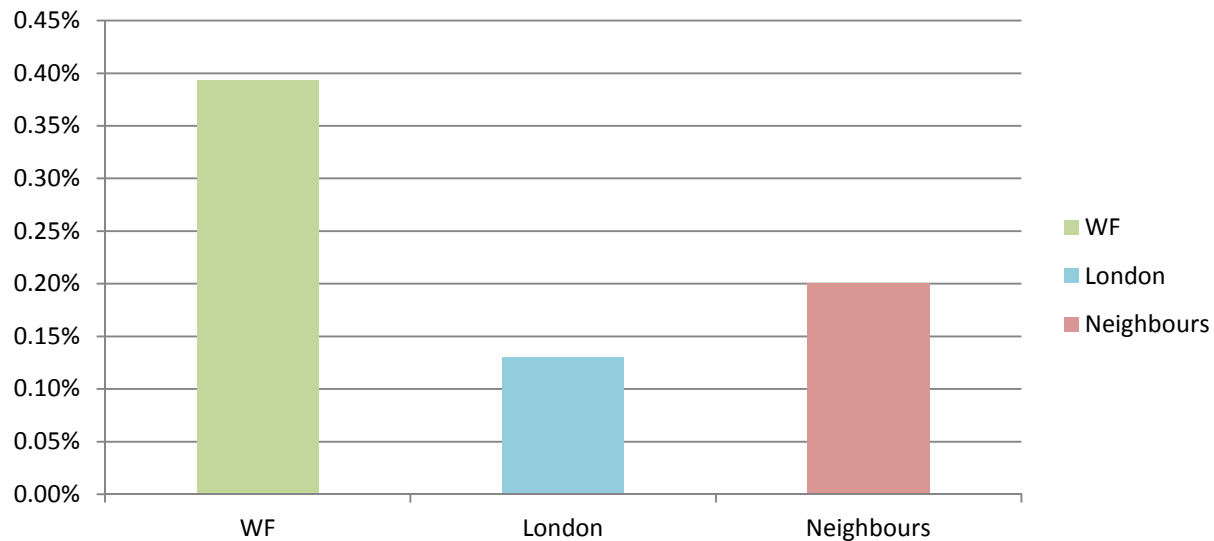


	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary : Secondary difference?	-£35,000		32/32		9/10
Fund Primaries less		4		2	
Fund Primaries the same		25		7	
Fund Primaries more		3		3	

25 of 32 London L.As use one rate; 7 of 10 Neighbour L.As use one rate

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### Split Sites Proportion



### SPLIT SITES

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Split Sites Total	£745,000	£239,604	3/32	£473,984	3/10
Split sites proportion	0.39%	0.13%	3/32	0.20%	2/10

*Higher in total and proportion than London average*

*Higher in total and proportion than Neighbour average*

### Primary: Secondary Ratio

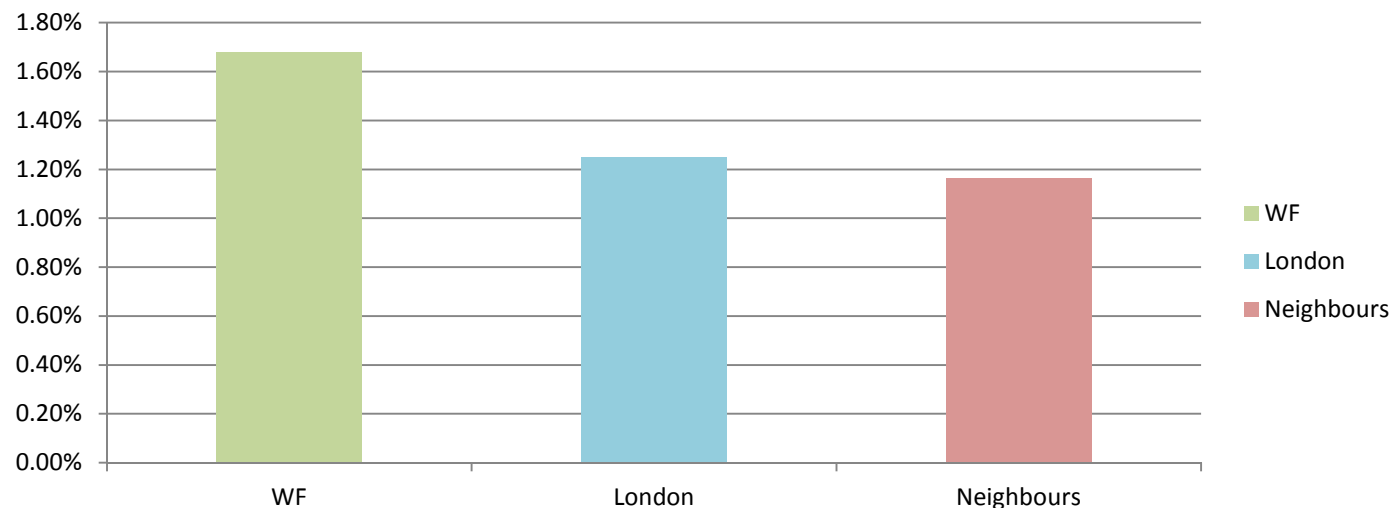
	WF	London	Neighbours	England
Ratio	1.38	1.31	1.31	1.30
WF Rank		4/32	1/10	14/151

### Cap and Scale

	WF	London	Neighbours	England
Using Cap	YES	21/32	5/10	108/152
Of those, using 100% Scale	YES	15/21	2/5	86/108

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### Rates Proportion



### Rates

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Rates Total	£3,183,577	£2,203,479	8/32	£2,845,690	4/10
Rates proportion	1.68%	1.25%	4/32	1.16%	1/10

*Higher in total than London Average  
Higher in proportion than London average*

*Higher in total than Neighbour Average  
Higher in proportion than Neighbour average*

*41st highest in total of the 152 England LAs (Top Quartile)  
16th highest in proportion of the 152 England LAs (Top Quintile)*

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PFI

	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
PFI Total	£2,703,034		2/12		2/5
PFI proportion	1.43%		2/12		1/5

- ❖ *2nd highest in total of the 12 London LAs with PFI*
- ❖ *3rd highest in proportion of the 12 London LAs*
- ❖ *2nd highest in total of the 5 Neighbour LAs with PFI*
- ❖ *Highest in proportion of the 5 Neighbour LAs*
- ❖ *14th highest in total of the 80 England LAs with PFI (Top Quintile)*
- ❖ *13th highest in proportion of the 80 England LAs (Top Quintile)*

## Five Questions

Q1: Should we change the factors used?

Q2: Should we change the rates applied to the factors?

Q3: Should we change the primary: secondary ratio?

Q4: Should we continue with the existing cap and scale to fund MFG?

Q5: Do you want us to model any changes?