

**Total Membership 25**  
**The Forum is quorate if at least 40% (10) of the members are present**



## London Borough of Waltham Forest SCHOOLS FORUM

Day/Date/Time	Venue
Wednesday 11 <sup>th</sup> October 2017 Tea/Coffee and Light Refreshments: 5:00pm Main Meeting: 5:30pm	Council Chambers, 1 <sup>st</sup> Floor, Waltham Forest Town Hall Forest Road Walthamstow E17 4JF
Contact:	Telephone / Email:
Virginia Flavius <b>Clerk to Schools Forum</b>	<a href="mailto:meetingsandevents@walthamforest.gov.uk">meetingsandevents@walthamforest.gov.uk</a>
Maintained Primary Headteacher Representatives (4)	
Jane Harris	Edinburgh Primary
Kate Jennings	Mission Grove
Lindsey Lampard	Chingford CofE Primary
Linda Adair	Henry Maynard Primary School and Nursery
Primary Academies and Primary Free Schools Representatives (4)	
Maureen Okoye ( <b>Vice-Chair</b> )	Davies Lane Primary Academy & Selwyn Primary
Lynne Harrowell	Larkwood Primary Academy
Anne Powell	Riverley Primary
Amanda Daoud	Larkwood / Lime Trust
Maintained Primary Governor Representatives (3)	
Cllr Aktar Beg	Edinburgh Primary
Thomas Goodall	Edinburgh Primary
Vacant	
Nursery School Representative (1)	
Helen Currie	Church Hill Nursery School and Children's Centre & Low Hall Nursery School and Children's Centre
Maintained Secondary Headteacher Representatives (3)	
Grainne Smyth	Leytonstone School
Lynnette Parvez	Kelmscott School
Shona Ramsay ( <b>Chair</b> )	The Lammas School
Secondary Academies and Secondary Free Schools Representatives (3)	
Mark Morrall	Rushcroft / Chingford Foundation
Gareth Cross	Connaught School for Girls
Rob Pittard	Norlington School for Boys
Maintained Secondary Governor Representative (1)	
Ian Moyes	Heathcote School
Special School and Special Academies Representative (1)	
Gary Pocock	Hornbeam Academy
PRU(1)	
Julian Lee	Hawkswood Group
Non School Members (4)	
<b>Early Years Providers</b>	Sarah Kendrick (Redwood Pre-School)
<b>16-19 Providers</b>	Penny Wycherley (Waltham Forest College)
<b>Trade Unions</b>	Steve White (NUT)
<b>Diocesan</b>	Moira Bishop (Brentwood Diocese)

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## AGENDA

Agenda Item	Report Name	Report Authors
1.	Welcome all and Apologies	Chair
2.	Declaration of Interest	All
3.	Minutes of the Meeting held on 13 <sup>th</sup> October 2017	Chair
3a	Matters Arising	Chair / Duncan James-Pike
4.	Local Funding Formula 2018-19	Duncan James-Pike
5.	Any Other Business	All
6.	<b>Date of Next Meeting:</b> Wednesday 8 <sup>th</sup> November 2017 5:30pm (Light refreshments from 5:00pm) <b>Council Chambers, Waltham Forest Town Hall</b>	All

**MINUTES OF SCHOOLS FORUM MEETING****Wednesday 13 September 2017****Venue, Waltham Forest Town Hall****5:30 – 7:00pm**

<b>ATTENDEES</b>	<b>CONSTITUENT</b>
Shona Ramsay	Chair of Schools Forum and Secondary Headteacher Representative
Virginia Flavius	Clerk to Schools Forum <a href="mailto:meetingsandevents@walthamforest.gov.uk">meetingsandevents@walthamforest.gov.uk</a> <b>020 8496 8279</b>
<b>Maintained Primary Headteacher Representatives (4)</b>	
Jane Harris	Edinburgh Primary
Kate Jennings	Mission Grove School
Lindsey Lampard	Chingford CofE Primary
Linda Adair	Henry Maynard Primary School and Nursery
<b>Primary Academies and Primary Free Schools Representatives (4)</b>	
Maureen Okoye (Vice-Chair)	Davies Lane Primary Academy & Selwyn Primary Academy
Lynne Harrowell	Larkswood Primary Academy
Anne Powell	Riverley Primary Academy
Vacant	
<b>Maintained Primary Governor Representatives (3)</b>	
Cllr Akhtar Beg	Edinburgh Primary
Thomas Goodall	Edinburgh Primary
Vacant	
<b>Nursery School Representative (1)</b>	
Helen Currie	Church Hill Nursery School and Children's Centre & Low Hall Nursery School and Children's Centre
<b>Maintained Secondary Headteacher Representatives (3)</b>	
Lynnette Parvez	Kelmescott School
Grainne Smyth	Leytonstone School
<b>Secondary Academies and Secondary Free School Representatives (3)</b>	
Mark Morrall	Rushcroft / Chingford Foundation

Gareth Cross	Connaught School for Girls
Rob Pittard	Norlington School and 6 <sup>th</sup> Form
<b>Maintained Secondary Governor Representative (1)</b>	
Ian Moyes	Heathcote School
<b>Special School and Special Academies Representative (1)</b>	
Gary Pocock	Hornbeam Academy
<b>PRU (1)</b>	
Julian Lee	Hawkswood Group
<b>Non-School Representatives (4)</b>	
Sarah Kendrick	Redwood Pre-School – Early Years Provider
Steve White	Trade Unions (NUT)
Penny Wycherley	Waltham Forest College representing the 16-19 Providers Sector
Moira Bishop	Diocesan
<b>LBWF Officers</b>	
Linzi Roberts-Egan	Deputy Chief Executive, Families and Homes Directorate
Andrew Beckett	Assistant Director - Inclusion
Duncan James-Pike	Strategic Finance Advisor – Children and Young People Services
Raina Turner	Head of Finance Families Group (Schools and Education Services)
Brendan Wells	Head of Service Pupil Based Commission and Administration
Hawa Bedwa	Schools, Interim DSG Accountant
Eve McLoughlin	Early Years
Lindsey Jackson	Business Development Consultant
David Killallon	Director of Learning & System Leadership
<b>Observers</b>	
G.E Jackson	Willowfield
Shermaine Lewis	Frederick Bremer School

## Minutes

### 1. Welcome all and Apologies

The Chair welcomed all to the meeting

Clerk received the following apologies:

- Lynette Parvez, Kelmscott School
- Moira Bishop, Diocesan
- Helen Currie, Church Hill Nursery School and Children's Centre
- Linzi Roberts-Egan Deputy Chief Executive, Families Directorate
- Steve White (NUT), Trade Unions
- Thomas Goodall, Edinburgh Primary
- Grainne Smyth, Leytonstone School

### 2. Declaration of interest

There were none

### 3. Minutes of the last meeting held on Wednesday 22 February 2017

The minutes of the last meeting were taken as correct.

#### 3.1 Matters Arising

There were no matters arising

### 4 Dedicated Schools Grant Outturn 2016-17

4.1 This report updates School Forum on the 2016-17 final outturns for the Dedicated Schools Grant (DSG).

4.2 This report presents a balanced budget.

4.3 Questions

4.3.1 Question: The commitment and the carried forward in the different blocks; is all of that already planned for and underway or is it a commitment to something the council is waiting further details on?

4.3.2 Response: For the Schools Block a lot of it is Primary Challenge and further commitments. Secondary challenge has been fully paid to the school. Other money has not been drawn down yet. There are two items on the list: Risks from Academy conversion and Leadership: £103k and £163k. Members were informed that

funds for schools in difficulty have already been allocated and schools in deficit will be supported so they have action plans to bring their deficits down.

- 4.3.3 There is a general contingency of £330k held for what may happen in the future with the national funding formula. The Universal Offer will be drawn on in the course of the year.
- 4.3.4 The £2.75m High Needs carry-forward relates to funds that will support the SEN budget with regards to Outreach, Independent schools etc. and will be identified as we progress. At the moment £120k has been committed to psychologists, out of the £0.5m contingency. There is more work to be done on the contingencies for 2017-18.
- 4.3.5 Question: For small primary schools; have we got plans within this contingency to support them if they get in a vulnerable position?
- 4.3.6 Response: Schools in deficit will not be bailed out. Support can be given to help develop a curriculum to come into balance over a number of years if required.
- 4.3.7 The £921k Contingency in Early Years is for a possible reduction figure for Early Years is based on the number reported in January's census. We know they will get a reduction as 300 places less than budgeted for, so will use January 2018 census, hoping the numbers will increase and not all contingency will be needed. We need to clarify the number as reported by the DFE.
- 4.3.8 Question: The Specialist Facilities in High Needs block, did you say something about that? There is a large underspend.
- 4.3.9 Response: There is a subgroup of School Forum; the details will be scrutinised in that group. There is further provision for 18-25 year age group to address the SEND reforms to look at how complex needs can be supported. It was proposed to convert that to capital. The capital development plan will be discussed at the inclusion group.
- 4.3.10 A bigger Complex Needs development on campus is being assessed, but it is early days, we will have more news in December. It is intended to progress the proposal in principal, but the shape of it is not yet known. As soon as there is any news members will be informed.
- 4.3.11 In terms of transparency; if schools are allocating money which is coming to an end, if it cannot be spent, with budget being difficult, people may feel differently.
- 4.3.12 Members were informed more would be known by the School Forum in January.
- 4.4 Amendments
  - 4.4.1 The second paragraph 2.3 to be re-numbered 2.4

4.4.2 The last sentences in new paragraph 2.4 and paragraph 4.3 to be amended to state  
“The capital reserves for maintained schools **increased by** £0.422 million to  
**£1.1million**”

4.4 Recommendations:

4.4.1 Members were asked to note the information.

4.4.2 So noted

## 5. School Budgets 2018-19

5.1 This report sets out the known changes to the funding available and methodology for setting school budgets for financial year 2018-19 (as at 7 September 2017).

5.2 Questions

5.2.1 Question: When is the intention to report back?

5.2.2 Response: If an announcement is received by next week, it may be possible to report back in October or November. Should get a minimum of ½%, or 1% be allocated, that would be great, but it is not possible to confirm a date at this time.

5.2.3 Question: Please explain point 4.16.

5.2.4 Response: It was decided not to have Looked After Children as a factor as it is a double premium on top of the LAC pupil premium and sufficient funds are being put into other deprivation factors. In 2018-19 this is being withdrawn.

5.2.5 Question: In Appendix B, in Central Support Services we do not do clothing grants.

5.2.6 Response: This is the full list of all allowable items. When we report back, all the detail will be set out as there is a rigorous test for services provided.

5.3 Recommendations

5.3.1 Members were asked to agree to establish a Task and Finish Group to advise the LA.

5.3.2 VOTES: 12 Agree, 0 Against, 0 Abstained

5.3.3 Members were asked to note the arrangements for central school support services and services to maintained schools

5.3.4 Nod and noted

5.3.5 Volunteers for Task and Finish Group:

Graham Jackson	Willowfield	Secondary	Maintained
Jane Harris	Edinburgh	Primary	Maintained
Julian Lee	Hawkswood Group	PRU	Maintained
Lynette Parvez	Kelmscott	Secondary	Maintained
Maureen Okoye	Davies Lane & Selwyn	Primary	Academy
Rob Pittard	Norlington	Secondary	Academy
Shona Ramsey	The Lammas	Secondary	Maintained

5.3.6 Timetable for heads will be distributed to ensure there are no clashes when scheduling the meetings.

## 6 Secondary Bulge Class Funding

6.1 This report sets out the Local Authority's position on funding for potential secondary school bulge classes.

6.2 Questions

6.2.1 Comment: There is a need for this, more understanding on how the model was calculated and why it is so far away from other boroughs.

6.2.2 Question: Appendix C secondary is not like primary, but it seems to be costing for 4 classes; you are paying for 8 teachers. Can understand why more than 1, but that did not seem to make sense.

6.2.3 Response: That is just an example done by a school for all 4 classes in one school. That cost is for all 4, it was the prospect of having 4 bulge classes and what it would cost if they had all 4 schools. The column next to it shows is a quarter of it for 1 class. It is not known exactly how many bulges will be needed, it may not be 4.

6.2.4 Comment: Bear in mind the contentions. If it is not attractive enough, no one will do it, and these are Waltham Forest children.

6.2.5 Response: The local authority treated this modelling in an abstract way so its number is looking at income per child. When the group got together to look at the work, comments were, it is going to be different from one school to another. Heads at the school will not know what capacity they will have in terms of their staff; that will vary from one year to another.

You cannot predict the cost of bringing one class, you would need the whole curriculum; we have gone for indicative subjects. It cannot be done proportionately.



6.2.6 Question: It will always cost more than you are given. What happens when a Free School opens in the future, because another school has doubled in size and we are not full? The recommendation is to agree the proposal without having clarity about how many exactly.

6.2.7 Response: We are likely to know if we need a secondary bulge by Christmas, we are looking for that assurance but it may be in January. There are decisions to be made on which schools are priority, and also on capital and in terms of education outcomes. The decision on which schools should be bulding will depend on a matrix financial and non-financial, which will need to be evaluated, which will go to the board and Heads are keen for this to be looked at.

6.2.8 In November or December a decision on the size of the growth fund needs to be made.

## 6.3 Recommendations

6.3.1 Members were asked to agree that the existing Growth Fund scheme funds secondary bulge classes adequately and that the existing Growth Fund scheme be amended for 2018-19 to include a table showing the secondary class size guarantee

6.3.2 VOTE: 10 Agreed, 0 Against, 1 Abstained

## 7 Update on ESG Exit Strategy

7.1 This report updates Schools Forum on progress in implementing the Education Services Grant (ESG) Exit Strategy.

7.1.1 Members' attention was drawn to Paragraph 4.4: As it was so challenging to divide services between universal and paid for, services were not stopped for non-contributing academies until September. The LA will reduce the contributions from nine ten months (April to December 2017) to seven months (April to October 2017) to ensure that maintained schools and the contributing academies have not been disadvantaged when compared to the non-contributing academies.

## 7.2 Questions

7.2.1 Question: You mentioned LA and people feeling more secure with LA.

7.2.2 Response: The clarity that the LA wants to know from schools is do you want one SLA for each, or one for all the services you have in the LA; we are happy with whatever schools want.

7.2.3 Comment: It is pleasing to see services to non-contributors being stopped.

7.2.4 Comment: budget uncertainty has made it very difficult for some schools to commit

## 7.3 Recommendations

7.3.1 Members were asked to note the contents of this report.

7.3.1 Duly noted

**8 Any Other Business**

No other business

Meeting adjourned at 18:40

**9 Date of Next Meeting**

Wednesday 11 October 2017

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## **Schools Forum 13 September 2017**

### **Summary of Decisions**

#### **Item 4. Dedicated Schools Grant Outturn 2016-17**

##### **Schools Forum noted:**

- 2.1 The original Waltham Forest DSG allocation of £248.0 million was revised downwards by £8.4 million to £239.08 million. The variance relates to deductions to the High Needs Block for direct funding of places by the Education Funding Agency of £7.85 million and the July 2016 reduction for Early Years of £0.54 million for census changes.
- 2.2 The final settlement of DSG allocation to the LA, after recoupment and adjustments, was £168.47 million. This budget achieved a break-even position 2016-17.
- 2.3 The cumulative carry forward into 2017-18 was £7.416 million which is fully committed for improvement projects approved by Schools Forum previously.
- 2.4 The revenue reserves for maintained schools as at 31 March 2017 totalled £9.68 million. The capital reserves for maintained schools increased by £0.422 million to £1.1 million.

#### **Item 5. School Budgets 2018**

##### **Schools Forum agreed:**

- 2.1 To agree to establish a Task and Finish Group to advise the LA:
  - How much / whether the Local Funding Formula should change in 2018-19 and 2019-20 to align with the National Funding Formula
  - Whether to use the Current Free School Meal factor instead of, or in addition to, the Free School Meal “Ever 6” factor
  - What level of Minimum Funding Guarantee should be set between minus 1.5% and 0%
  - Any other changes in the rates applied to formula factors

##### **Schools Forum noted:**

- 2.2 The arrangements for central school support services and services to maintained schools.

**Item 6: Secondary Bulge Class Funding**

**Schools Forum agreed:**

- 2.1.1 The existing Growth Fund scheme funds secondary bulge classes adequately.
- 2.1.2 The existing Growth Fund scheme be amended for 2018-19 to include a table showing the secondary class size guarantee (Appendix D)

**Item 7: Update on ESG Exit Strategy**

**Schools Forum noted:**

- 2.1 The contents of this report.

Meeting / Date	<b>SCHOOLS FORUM 11 October 2017</b>	Agenda Item	4
Report Title	<b>Local Funding Formula 2018-19</b>		
Decision/Discussion/ Information	For Information and Decision		
Report Author/ Contact details	<b>Duncan James-Pike, Strategic Finance Advisor, 020 8496 3502</b> <a href="mailto:duncan.james-pike@walthamforest.gov.uk">duncan.james-pike@walthamforest.gov.uk</a>		
Appendices	<b>Appendix A:</b> NFF and LFF factor rates <b>Appendix B:</b> NFF and LFF Proportions <b>Appendix C:</b> Example of applying additional funding		

## 1. SUMMARY

- 1.1 This report sets out some details of the national funding formula (NFF), how it compares to the current local funding formula (LFF) and how the transition between the two could be managed.

## 2. RECOMMENDATIONS

- 2.1.1 **Schools Forum to note** the contents of this report.

- 2.2 **Schools Forum to agree** to a consultation asking:

- 2.2.1 Should the LFF be changed to match the NFF as far as practicable?

And, regardless of the above, in principle:

- 2.2.2 Should the primary lump sum be increased?

- 2.2.3 Should the values attached to the IDCAI funding factors be amended so that increasing levels of deprivation attract increasing levels of funding?

- 2.2.4 Should more funding be targeted at Low Prior Attainment?

- 2.2.5 Should the minimum funding guarantee be increased from -1.5%?

## 3. REASON

- 3.1 Although Local Authorities (LAs) are responsible for making the final decisions on the local funding formula, they must engage in open and transparent consultation with all maintained schools and academies in their area, as well as with their Schools Forum, about any proposed changes to the local funding formula (LFF) including the method, principles and rules adopted.

- 3.2 Any consultation should include a demonstration of the effect of modelling such changes on individual maintained schools and academies.

## 4. BACKGROUND

### Principles

- 4.1 Schools Forum has adopted the following four principles to be used when making decisions on funding: fairness, transparency, stability; and protecting vulnerable pupils.

### National Funding Formula

- 4.2 The national funding formula (NFF) is being introduced for the 2018-19 financial year for the Schools Block (SB). LA allocations for 2018-19 for the SB have been published with final allocations following as usual in December, on the basis of pupil numbers recorded in the October 2017 census.
- 4.3 While it remains the government's intention that a school's budget should be set on the basis of a single NFF, in 2018 -2019 and 2019-2020, LAs will continue to determine final funding allocations for schools through a local funding formula (LFF). In 2018 -2019 and 2019-2020, the NFF will set notional allocations for each school, which will be aggregated and used to calculate the total SB received by each LA.
- 4.4 Schools Forum will need to advise the LA whether the LFF should change in 2018-19 and 2019-20 to align with the NFF, and if so, the preferred method(s).
- 4.5 Compared to the 2017-18 baseline used by the Education and Skills Funding Agency (ESFA), the LA is expecting at least £199.83 million (an additional **£1.121 million** or 0.56%) in 2018-19 and £200.82 million (a further **£0.990 million** or 0.5%) in 2019-20 to be available to distribute through the LFF.

### NFF Factors

- 4.6 **Appendix A** shows the basic NFF factor rates; the factor rates including Waltham Forest's Area Cost Adjustment (ACA) of 1.0820; the factor rates in the 2017-18 LFF; and the difference between the NFF + ACA and LFF factor rates.
- 4.7 **Appendix B** shows the NFF National weighting – the percentage of the national funding pot used in each factor compared to Waltham Forest's 2017-18 LFF. The NFF directs more funding through Low Prior Achievement, IDACI and Lump Sum than the LFF and less through the other factors. Mobility, Split-Sites, PFI and Growth are being funded separately from the

NFF. Adopting the NFF locally, might have a significant distributional effect on school budgets.

### **Applying the additional funding**

- 4.8 Illustrative school-level funding of the NFF provided by the ESFA includes the application of transitional funding floors to ensure that every school can be said to be better off under the NFF. These funding floors are not available under the LFF, so simply running the NFF factor rates in the 2017-18 APT does not distribute the full amount available as the lower AWPU rates in the NFF more than offset the increases in other factors.
- 4.9 On the other hand, simply putting the expected additional funding at LA level through the existing LFF will not necessarily mean an increase for every school as some schools may still be receiving funds through the minimum funding guarantee.
- 4.10 **Appendix C** shows the impact of adding just over £1 million to the 2017-18 LFF by raising both primary and secondary AWPU by 0.7% (raising AWPU has been the usual method for applying any additional funding). The cost of keeping the MFG at -1.5% falls from £419,000 to £232,000 and the cap is raised from 1.7% to 2.9%. 10 schools do not receive any funding increase as they are still subject to MFG, nine get their full increase as they are no longer capped and 11 still have their increases reduced by capping.
- 4.11 Although applying the NFF without the ability to use funding floors does not distribute the full funding available, a decision needs to be made as to whether we should align the LFF with the NFF and if so, how.

### **Lump Sum**

- 4.12 In Waltham Forest's LFF the Lump Sum is £90,000 for primary and £125,000 for secondary. The NFF funds both phases at £110,000 (£119,000 with ACA). The purpose of the lump sum is to make a contribution to the costs that do not vary with pupil numbers, and to give schools (especially small schools) certainty that they will attract a fixed amount each year in addition to their pupil-led funding.

### **IDACI**

- 4.13 In 2016-17, when the Income Deprivation Affecting Children Index (IDACI) bands were updated, Schools Forum agreed that the stability principle should override the fairness principle and factor rates for the new IDACI bands were flattened to minimise the disruption to individual school budgets. The principle of protecting vulnerable pupils was satisfied by ensuring that deprivation funding in the primary and secondary phases was maintained at the same

proportion in each of the phases. In 2017-18, new bands A to F were introduced, but the factors remained flattened. Given that the NFF funds each band with a higher amount as the level of deprivation increases, it may be time to revisit how the LFF funds this aspect of deprivation.

- 4.14 IDACI reflects the level of deprivation in the postcode where the pupil lives. Pupils attracting funding through the IDACI factor are divided into 6 bands, reflecting the relative levels of deprivation of the areas they live in (bands A to F, with band A representing the most deprived areas).

### **Low Prior Attainment**

- 4.15 The NFF directs more funding through Low Prior attainment than the LFF in LAs including Waltham Forest. The DFE believes it is right that pupils with low prior attainment attract more funding through the NFF because of the strength of evidence of its value as an indicator of educational need, above and beyond deprivation.
- 4.16 A pupil who does not achieve the expected level in the Early Years Foundation Stage Profile on entry to primary school will attract an additional £1,050 (£1,136 with ACA) a year through the NFF, throughout their time in primary school. A pupil who does not achieve the expected level at key stage 2 will attract an additional £1,550 (£1,677) a year while in secondary education.
- 4.17 The low prior attainment funding unit value is currently the same for all pupils, whether they narrowly missed the standard or were at the bottom of their cohort. As proposed in the second stage consultation, the DFE will consider whether tiering this factor in the longer term might improve our targeting of funding to those with the highest level of need.
- 4.18 LAs authorities will continue to set a minimum funding guarantee (MFG) in their local formulae to protect schools from excessive year on year changes while allowing changes in pupil characteristics (for example reducing levels of deprivation in a school) to flow through. Greater flexibility is being introduced in 2018-19 to allow LAs to set the MFG between 0% and minus 1.5% per pupil following local consultation – rather than it being set nationally at minus 1.5% per pupil, as in previous years. This protects schools from excessive turbulence, but ensures LAs have the flexibility to move towards the NFF.
- 4.19 The MFG applies to pupils in reception to year 11; early years pupils, and ESFA funded post-16 pupils are excluded from the calculation. Lump sum and rates are excluded from the MFG. Capping and scaling can only be applied to the extent that it offsets the cost of the MFG, and it must be applied on the same basis to all schools.



## 5. CONSULTATION

### Task and Finish Group

- 4.28 A task and finish group met on 3 October 2017 to have an initial discussion on the NFF and which models would be useful to examine to help inform decisions on changes to the LFF. The technical papers from the DFE were issued on 29 September, which limited these initial discussions, however the group did ask for models to be produced, include running the NFF factors to determine how much additional resource would be available; the impact of using different levels of MFG; and a rebalancing of deprivation and low prior attainment factors.
- 4.29 The group has agreed to meet again on 2 November 2017 in order to feed back its views on the modelling to November Schools Forum.
- 4.30 To recognise the extra costs of deprivation, in addition to the Income Deprivation Affecting Children Index (IDACI) data, LAs may now use both Current FSM and FSM Ever 6, rather than one or the other. Current FSM data reflects those pupils eligible for FSM on the Census date and can be used to reflect the actual costs of providing FSMs. FSM Ever 6 records all pupils that have been eligible for FSM in the last six years so is a wider proxy indicator for general levels of deprivation.
- 4.31 The group debated the merits of including the Current FSM factor in addition to the FSM Ever6 factor and concluded that Current FSM did not reflect the issues caused by deprivation that schools experienced, not least the numbers of pupils whose families were just above the income threshold or had no recourse to public funds. Paying for free school meal take-up, which Current FSM would address, was not seen as an additional burden as it was often relatively stable from year to year. For these reasons, the group did not recommend consulting on adopting Current FSM.
- 4.32 All consultation questions recommended to Schools Forum in this report were agreed by the group.

**APPENDIX A COMPARISON OF FACTORS NFF TO LFF**

	NFF		ADJUSTMENT (ACA) OF 1.0820		LFF 2017-18		LFF 2017-18 v NFF WITH ACA	
	PRIMARY £	SECONDARY £	PRIMARY £	SECONDARY £	PRIMARY £	SECONDARY £	PRIMARY £	SECONDARY £
KS1	2,747		2,972		3,508		-536	
KS2	2,747		2,972		3,508		-536	
KS3		3,863		4,180		4,776		-596
KS4		4,386		4,746		4,776		-30
Current FSM	440	440	476	476	a	a	a	a
Ever 6 FSM	540	785	584	849	788	1,437	-204	-588
IDACI A	575	810	622	876	200	500	422	376
IDACI B	420	600	454	649	200	500	254	149
IDACI C	390	560	422	606	200	500	222	106
IDACI D	360	515	390	557	225	500	165	57
IDACI E	240	390	260	422	125	175	135	247
IDACI F	200	290	216	314	80	100	136	214
LOW PRIOR ATTAINMENT	1,050	1,550	1,136	1,677	600	600	536	1,077
EAL	515	1,385	557	1,499	800	800	-243	699
MOBILITY	b	b	b	b	1,000	1,000	b	b
LUMP SUM	110,000	110,000	119,024	119,024	90,000	125,000	29,024	-5,976

**NOTES**

- a Current FSM Not used in Waltham Forest previously
- b MOBILITY NFF funding same as LFF in 2017-18
- ACA 1.0820

**APPENDIX B: COMPARISON OF FACTOR WEIGHTING NFF TO LFF**

	<b>NFF NATIONAL WEIGHTING</b>	<b>LOCAL WEIGHTING (APT + GROWTH)</b>	<b>CHANGE IN WEIGHTING NATIONAL TO LOCAL</b>
BASIC PER PUPIL	72.90%	75.60%	-2.70%
DEPRIVATION FSM	3.94%	6.91%	-2.97%
DEPRIVATION IDACI	5.16%	3.18%	1.98%
LOW PRIOR ATTAINMENT	7.40%	2.24%	5.16%
EAL	1.20%	3.38%	-2.18%
MOBILITY	0.10%	0.20%	-0.10%
LUMP SUM	6.80%	3.38%	3.42%
SPARSITY	0.10%		0.10%
PREMISES	1.80%	3.48%	-1.68%
GROWTH	0.50%	1.64%	-1.14%
	100%	100%	0%
<b>DEPRIVATION TOTAL</b>	<b>9.10%</b>	<b>10.08%</b>	<b>-0.98%</b>

APPENDIX C: EXAMPLE OF APPLYING ADDITIONAL FUNDING

Re-run Submitted 2017-18 APT with 0.7% AWPU uplift. MFG kept at -1.5%

KEY

	NO ADDITIONAL DUE TO MFG
	NO LONGER CAPPED

School Name	SUBMITTED 2017-18 APT	MODEL	Change		2017-18 MFG UPLIFT or CAP	MODEL MFG UPLIFT or CAP	MOVEMENT in MFG or CAP
	17-18 Post MFG Budget	17-18 Post MFG Budget	Change	Change			
Chase Lane Primary	£3,120,577.48	£3,156,779.78	£36,202.30	1.16%	-£47,225.08	-£26,664.95	£20,560.13
Whitehall Primary School	£1,838,181.68	£1,848,126.86	£9,945.18	0.54%			
Downsell Primary School	£2,822,530.85	£2,835,643.75	£13,112.90	0.46%			
Newport School	£3,383,345.58	£3,399,737.95	£16,392.38	0.48%	£2,613.97		-£2,613.97
Chapel End Infants	£1,307,794.49	£1,321,900.52	£14,106.03	1.08%	-£59,739.99	-£52,165.85	£7,574.14
Edinburgh Primary	£2,891,825.82	£2,891,825.82	£0.00	0.00%	£28,680.96	£13,407.13	-£15,273.83
GREENLEAF PRIMARY SCHOOL	£1,903,336.60	£1,914,214.91	£10,878.31	0.57%			
HANDSWORTH PRIMARY SCHOOL	£1,692,131.41	£1,711,823.72	£19,692.31	1.16%	-£17,314.74	-£7,935.95	£9,378.79
Thorpe Hall Primary	£2,258,840.48	£2,271,241.26	£12,400.78	0.55%			
THE WINNS PRIMARY	£3,581,530.02	£3,601,150.26	£19,620.24	0.55%			
Woodford Green Primary	£901,836.48	£906,649.46	£4,812.98	0.53%			
Oakhill Primary	£995,744.48	£1,001,441.47	£5,696.99	0.57%			
Henry Maynard Primary School	£3,512,877.27	£3,533,185.08	£20,307.81	0.58%			
South Grove Primary	£2,277,552.53	£2,291,728.38	£14,175.85	0.62%	-£3,567.66		£3,567.66
Dawlish Primary School	£914,586.85	£924,634.39	£10,047.54	1.10%	-£11,425.34	-£6,190.78	£5,234.56
Gwyn Jones Primary	£1,653,102.66	£1,662,532.16	£9,429.50	0.57%			
George Tomlinson Primary	£2,357,929.44	£2,371,017.78	£13,088.35	0.56%			
Mission Grove Primary School	£3,375,932.59	£3,394,325.04	£18,392.44	0.54%			
Coppermill Primary School	£1,175,363.49	£1,175,363.49	£0.00	0.00%	£16,090.47	£9,828.69	-£6,261.78
Stoneydown Park Primary	£2,010,712.52	£2,033,989.22	£23,276.70	1.16%	-£17,050.56	-£4,578.50	£12,472.06
Parkside Primary School	£2,149,528.47	£2,174,856.77	£25,328.30	1.18%	-£17,369.88	-£3,533.79	£13,836.09
The Jenny Hammond Pri. School	£1,395,384.83	£1,403,144.52	£7,759.70	0.56%			
Ainslie Wood Primary School	£1,816,368.92	£1,826,166.77	£9,797.84	0.54%			
Barn Croft Primary	£931,528.69	£936,096.10	£4,567.42	0.49%			
Chingford C of E Primary School	£1,625,535.60	£1,644,565.57	£19,029.97	1.17%	-£46,062.11	-£36,879.10	£9,183.01
St Mary's Catholic Primary	£903,188.19	£913,270.58	£10,082.38	1.12%	-£23,851.86	-£19,122.68	£4,729.17
St. Joseph's Catholic Junior	£1,008,049.71	£1,016,904.80	£8,855.09	0.88%	-£3,354.55		£3,354.55
St. Saviour's C of E Primary	£1,544,157.99	£1,551,279.52	£7,121.53	0.46%	£1,374.85		-£1,374.85
St Joseph's Catholic Infants	£814,522.43	£823,485.51	£8,963.08	1.10%	-£73,972.83	-£69,331.60	£4,641.22
St. Mary's C of E Primary	£2,312,717.23	£2,312,717.23	£0.00	0.00%	£31,354.36	£17,627.55	-£13,726.80
Our Lady and St George's Catholic Primary School	£1,806,464.32	£1,821,161.13	£14,696.81	0.81%	-£4,530.63		£4,530.63
St. Patricks Catholic Primary	£1,825,412.83	£1,835,456.23	£10,043.40	0.55%			
Frederick Bremer School	£5,943,587.09	£5,972,037.72	£28,450.63	0.48%			
Heathcote Secondary School & Science College	£5,731,529.18	£5,760,514.72	£28,985.54	0.51%			
Willowfield Humanities College	£4,920,500.88	£4,946,210.09	£25,709.21	0.52%			
Leytonstone Business and Enterprise Specialist School	£4,975,283.91	£5,002,664.72	£27,380.81	0.55%			
WALTHAMSTOW SCHOOL FOR GIRLS	£5,488,849.60	£5,518,804.68	£29,955.07	0.55%			
Kelmscott Secondary School	£5,483,764.59	£5,512,649.83	£28,885.25	0.53%			
The Lammas School and Sixth Form	£5,208,839.00	£5,208,839.00	£0.00	0.00%	£57,493.85	£34,392.33	-£23,101.51

APPENDIX C: EXAMPLE OF APPLYING ADDITIONAL FUNDING

Re-run Submitted 2017-18 APT with 0.7% AWPU uplift. MFG kept at -1.5%

KEY

	NO ADDITIONAL DUE TO MFG
	NO LONGER CAPPED

School Name	SUBMITTED 2017-18 APT	MODEL	Change		2017-18 MFG UPLIFT or CAP	MODEL MFG UPLIFT or CAP	MOVEMENT in MFG or CAP
	17-18 Post MFG Budget	17-18 Post MFG Budget	Change	Change			
Holy Family Catholic School	£5,268,186.68	£5,297,473.11	£29,286.43	0.56%			
Buxton School	£8,048,098.50	£8,048,098.50	£0.00	0.00%	£101,572.68	£58,189.68	-£43,383.00
George Mitchell School	£4,963,826.93	£4,963,826.93	£0.00	0.00%	£28,139.54	£2,672.14	-£25,467.40
Larkwood Primary	£3,065,325.01	£3,081,507.41	£16,182.40	0.88%			
Yardley Primary	£1,839,328.86	£1,860,975.52	£21,646.67	0.67%	-£15,135.84	-£4,441.15	£10,694.69
Davies Lane Primary School	£3,236,418.66	£3,236,418.66	£0.00	0.00%	£53,445.44	£35,077.55	-£18,367.89
Hillyfield Primary Academy	£4,762,750.01	£4,787,993.57	£25,243.57	3.44%			
EmmanuelCommunity School	£734,344.60	£734,344.60	£0.00	0.00%	£19,400.44	£15,796.85	-£3,603.59
Willow Brook Primary Academy	£2,228,629.42	£2,240,416.30	£11,786.88	0.27%			
The Woodside Primary Academy	£4,350,203.84	£4,373,016.36	£22,812.52	1.38%			
Chapel End Junior Academy	£1,647,709.65	£1,656,893.59	£9,183.94	0.47%			
Riverley Primary School	£1,941,884.89	£1,956,161.18	£14,276.29	0.54%	-£4,797.68		£4,797.68
Sybourn Primary School	£2,649,748.77	£2,663,770.24	£14,021.48	0.76%			
THOMAS GAMUEL PRIMARY	£1,842,170.22	£1,856,665.42	£14,495.20	3.70%	-£4,672.80		£4,672.80
Walthamstow Primary Academy	£392,032.84	£393,770.18	£1,737.34	0.10%			
Longshaw Primary School	£1,720,442.91	£1,729,970.64	£9,527.73	0.46%			
Roger Ascham Primary	£2,080,653.87	£2,091,851.41	£11,197.54	0.85%			
CHINGFORD HALL PRIMARY	£1,318,453.62	£1,325,255.63	£6,802.01	0.35%			
Whittingham Primary Academy	£1,918,815.34	£1,918,815.34	£0.00	0.00%	£16,800.52	£6,609.78	-£10,190.74
Mayville Primary School	£1,717,596.75	£1,721,489.12	£3,892.37	0.08%	£5,267.02		-£5,267.02
Barclay Primary	£4,664,750.26	£4,715,006.25	£50,255.99	1.94%	-£23,981.07		£23,981.07
Selwyn Primary School	£2,592,439.21	£2,606,804.47	£14,365.26	0.40%			
Rushcroft Foundation School	£3,566,457.30	£3,585,346.38	£18,889.08	0.73%			
Eden Girls' School Waltham Forest	£2,603,671.83	£2,617,323.23	£13,651.40	0.38%			
Connaught School for Girls	£3,562,178.40	£3,582,337.90	£20,159.50	0.58%			
Norlington Boys	£3,477,865.64	£3,477,865.64	£0.00	0.00%	£56,742.62	£38,722.77	-£18,019.85
Highams Park School	£6,677,562.15	£6,717,647.12	£40,084.97	0.58%			
Chingford Foundation School	£6,911,152.29	£6,994,981.88	£83,829.58	1.51%	-£44,923.83	-£1,480.11	£43,443.73
Walthamstow Academy	£5,534,697.35	£5,564,217.81	£29,520.46	0.59%			
	<b>£195,178,341.97</b>	<b>£196,228,381.21</b>	<b>£1,050,039.25</b>	<b>0.54%</b>			
<b>MFG Funded by Capping</b>					<b>418,976.70</b>	<b>232,324.00</b>	<b>- 186,652.70</b>