

London Borough of Waltham Forest SCHOOLS FORUM

Day/Date/Time	Venue
Wednesday 10 th February 2016 Tea/Coffee and Light Refreshments: 5:00pm Main Meeting: 5:30pm	Room 3, 1 st Floor, Waltham Forest Town Hall
Contact:	Telephone / Email:
Debbie Callender-O'Neill, Clerk to Schools Forum	020 8496 3669 debbie.callender-oneill@walthamforest.gov.uk

Maintained Primary Headteacher Representatives (4)	
Jane Harris	Edinburgh Primary
Kate Jennings	Mission Grove
Lindsey Lampard	Chingford CofE Primary
Maureen Okoye (Vice-Chair)	Davies Lane Primary
Nursery School Representative (1)	
Sandra Campbell	Church Hill Nursery
Maintained Primary Governor Representatives (3)	
Greta Akpeneye	Thorpe Hall Primary
Cllr Aktar Beg	Edinburgh Primary
Thomas Goodall	Edinburgh Primary
Maintained Secondary Headteacher Representatives (3)	
John Hernandez	Norlington School for Boys
Lynnette Parvez	Kelmscott School
Shona Ramsay (Chair)	The Lammas School
Maintained Secondary Governor Representative (1)	
Ian Moyes	Heathcote School
Special School and Special Academies Representative (1)	
Gary Pocock	Hornbeam Academy
Primary Academies and Primary Free Schools Representatives (3)	
Matt Hanks	Roger Ascham Primary Academy
Lynne Harrowell	Larkwood Primary Academy
Anne Powell	Riverley Primary
Secondary Academies and Secondary Free Schools Representatives (2)	
Mark Morrall	Rushcroft / Chingford Foundation
Jon Ashwell	Highams Park School
PRU(1)	
Julian Lee	Hawkswood Group
Non School Members (4)	
Early Years Providers	Sarah Kendrick (Redwood Pre-School)
16-19 Providers	Paolo Ramello (Sir George Monoux College)
Trade Unions	Steve White (NUT)
Diocesan	Moira Bishop (Brentwood Diocese)
Total Membership 23	
The Forum is quorate if at least 40% (9) of the members are present	

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 January 2016	Chair
3.1	Matters Arising – Update on Local Funding Formula and other matters arising	Chair / Duncan Pike
4	Verbal Update of the National Funding Formula and Schools Block Review Group	Duncan Pike
5	Early Years Funding Block – provision for the free education for 2, 3 and 4 year olds for 2015-16 and Feedback from consultation	Eve McLoughlin
6	Growth Fund for 2016-17 and amendments to Growth Fund Criteria	Duncan Pike Rishi Peetamsingh
7	Schools Forum Dates 2016-17	Chair / Clerk
8	Any Other Business	All
9	Date of Next Meeting: 8 June 2016 – to be agreed 5:30pm (Light refreshments from 5:00pm) Room TBC, Waltham Forest Town Hall	All

MINUTES OF SCHOOLS FORUM MEETING
Wednesday 13 January 2016
Committee Room 3, Waltham Forest Town Hall
5:30 – 7:00pm

ATTENDEES	SECTOR
Shona Ramsay	Chair of Schools Forum and Secondary Headteacher Representative
Debbie Callender-O'Neill	Clerk to Schools Forum debbie.callender-oneill@walthamforest.gov.uk 020 8496 3669
Maintained Primary Headteacher Representatives (4)	
Jane Harris	Edinburgh Primary
Maureen Okoye (Vice-Chair)	Davies Lane Primary School
Nursery School Representative (1)	
Sandra Campbell	Church Hill Nursery School and Children's Centre
Maintained Primary Governor Representatives (3)	
Greta Akpeneye	Thorpe Hall Primary
Cllr Aktar Beg	Edinburgh Primary
Maintained Secondary Headteacher Representatives (3)	
Zoe Cozens for John Hernandez	Heathcote School and Science College Norlington School for Boys
Lynnette Parvez	Kelmscott School
Maintained Secondary Governor Representative (1)	
Ian Moyes	Heathcote School
Special School and Special Academies Representative (1)	
Gary Pocock	Hornbeam Academy
Primary Academies and Primary Free School Representatives (3)	
Anne Powell	Riverley Primary Academy
Secondary Academies and Secondary Free School Representatives (2)	
Mark Morrall	Rushcroft / Chingford Foundation
Jon Ashwell	Highams Park School
Non-School Representatives (4)	
Sarah Kendrick	Redwood Pre-School – Early Years Provider

Steve White	Trade Unions (NUT)
Penny Wycherley	Waltham Forest College representing the 16-19 Providers Sector
LBWF Officers	
Linzi Roberts-Egan	Deputy Chief Executive for Families
Andrew Beckett	Interim Assistant Director, Inclusion
Gerry Kemble	Head of Waltham Forest Traded Services – Human Resources and Transformation
Eve McLoughlin	Head of Education Support
Rishi Peetamsingh	Group Accountant - Schools
Duncan Pike	Strategic Finance Advisor – Families
Shehwar Sultan	Principal Accountant – Schools & High Needs
Raina Turner	Head of Finance Families Group (Schools and Education Services)
Observers	
Linda Adair	Henry Maynard Infants School
Mary Arthur	Early Years SEND Team SENCO – George Mitchell School
Phil Grundy	Highams Park School
Graham Moss	Chairperson of the Lion Trust Academy Board
Sanjaya Gunatilake	Group Accountant

Minutes

1. Welcome all and Apologies

The Chair welcomed all to the meeting.

Chair explained to Forum the Schools Organisation and Admission Board (SOAB) minutes of 4th November and the list of school expansions are included in the agenda pack.

Chair also explained the papers can be watched on the TV screen and paper copies of the papers are available from the Clerk.

Clerk received the following apologies:

- Kate Jennings – Mission Grove
- Lynne Harrowell – Larkwood Primary Academy
- Lindsey Lampard – Chingford CofE Primary
- Thomas Goodall – Edinburgh Primary

2. Declaration of interest

Trade Union Representative and Secondary Governor Representative declared an interest regarding agenda item 8 – *Trade Union Facility Time* due to their involvement in trade union matters.

3. Minutes of the last meeting held on 11 November 2015 and Matters Arising

The minutes of the last meeting were reviewed for accuracy.

There were no amendments to the minutes therefore Chair signed off as a true record of the meeting.

3.1 Matters Arising

There were none.

4. DSG Funding Blocks 2016-17 – for Information and Decision

This report updates School Forum on the DSG funding allocations between the three blocks: Schools Block, Early Years Block and High Needs Block.

- Early Years remains the same.
- There is no additional funding for growth in commissioned places from the High Needs Block.
- In **Table 2: Transfer of funding between the three funding blocks** it shows the transfer from the Early Years Block to the High Needs Block for SEN support for High Needs pupils in early years settings and the transfer from Early Years to Schools for early years provision in schools
- Schools Block would contribute to the High Needs Block.

There were no questions or comments raised.

DECISION

Schools Forum noted:

- The Dedicated Schools Block (DSB) funding for each of the three funding blocks for 2016-17 as announced by the DfE on 17th December 2015 as shown in table 1.
- The latest control total for 2015-16 as shown in Appendix A.

Schools Forum approved:

- The inter-block transfers as set out in Table 2.
<http://www.walthamforest.gov.uk/schoolsforum> Agenda Item 4

5. Local Funding Formula and Growth Fund Allocations for 2016-17

The report informs Schools Forum on the proposed allocation of funding for 2016-17 for the Schools Block. In the September meeting it was agreed not to alter the formula. Any changes that are made, may affect the High Needs Block.

Questions/Comments

- There is further work to be completed
- **Question:** Looking at the list of Secondary schools (*Appendix A*) it appears they are being hit hard. Is this due to the low number of pupils? **Response:** it can be two reasons: a drop in Deprivation and the low numbers. The rates of FSM6 and IDACI bands have been changed in order to retain the deprivation funding proportions. Bands 1, 2 and 3 were used.
- That change can be seen in *Appendix E2 Secondary variances* that show each factor on what school is gaining or losing.
- For George Mitchell, they face a cash reduction in 2016 and are one of three of the largest cash reduction.
- **Comment:** there are some big losers amongst the Secondary schools
- The minimum funding guarantee (MFG) is set at minus 1.5% which was set by the government.
- The majority of funding follows the pupil. Fluctuation of pupil numbers drives this.
- **Question:** what is the impact of the High Needs Block? **Response:** The SEN is based on factors. The second change is the top-up funding. There will not be a significant change.
- There were discussions at the bursars meeting regarding the huge impact of the IDACI. Would another model be used? There is a concern with shifting funding into the Free School Meal (FSM) rates, based on parents making applications, however these applications are dropping.
- **Question:** Is the FSM causing this problem? Is there an argument for changing the rate? **Response:** In *Appendix E1 – Table 2 (Deprivation Comparator: Funding Rates per pupil,*

shows the difference between the factor rate. There was a further adjustment to the primary Age Weighted Pupil Unit (AWPU).

- **Comment:** Is that when you see they have lost under IDACI 6 factor. What is the year on year difference? **Response:** an individual sheet can be provided to show the factors, but only if Schools Forum approve this (recommendation 2.1).
- **Chair:** There is a lot of detailed work to try to come to a decision now.
- There are losers, but if the Borough is changing we have a responsibility to reflect that. Walthamstow is changing. Deprivation is changing. 20 years ago the Borough is not the same and will not be in 20 years' time. We need to keep similar factor but plan for the future.
- **Chair:** Previously there was quite a lot of scaling up to the IDACI 6 factor but the current model is a flat structure.
- Agreed that this is a bit arbitrary. We need to hit the Deprivation rate. Checks were made to see how many schools lost and gained and tried to balance the fairness. The following principles are applied: Transparency; Fairness, Stability and Support for vulnerable students.
- Where pupil numbers have dropped dramatically this would need to be reviewed fully.
- The difficulty is the hidden poverty which could be difficult to measure.
- **Chair:** Decisions need to be made tonight. We could ask for more detail or discuss fully however we do need to decide on these recommendations now.
- Some schools are inexperienced in knowing they have made the right decision or not. Can an emergency Schools Forum meeting be called to discuss this? **Response:** The IDACI changes and its significant impact. It is different in Waltham Forest as we already secured a mandate. We altered the formula changes. Colleagues in other boroughs needed to have emergency meetings.
- The submission of the final decisions must be made by next Thursday, with the final decision by Monday.
- We could review the different factors. If you use a fairly flatter structure, you may do that but keep the turbulence to the system minimum.
- **Chair:** there has not been any opportunity to speak to one another.

Chair agreed to adjourn the meeting so that the constituents can agree their decisions collectively

Primary comment:

It would be inappropriate for a small group to make the decision in an emergency meeting, and that we should go ahead and make the decision tonight, in line with the proposals from the Local Authority Officers.

Secondary comment:

The Secondary perspective also felt the same way but this would need to be revisited in the future

Further comments will be discussed at the next Schools Block Review meeting.

Votes:

Recommendation: 2.1-2.13 (not 2.4)

For: 15

Against: 1

Abstention: 1

DECISION

Schools Forum agreed

2.1 The AWPU for primary schools is raised by £10.50 to £3,450.50.

2.2 Rates for 2016-17 are the actual rates for 2015 adjusted upwards by 1%.

2.3 PFI allocations for 2016-17 are those for 2015-16 adjusted upwards for 2.5%.

Schools Forum noted that:

2.5 The AWPU for secondary schools is unchanged at £4,760.

2.6 Deprivation proportions from 2015-16 are retained for each sector in 2016-17. For primary schools this is 7.8% or £8.51m and for secondary 13.5% or £11.20m.

2.7 The minimum funding guarantee is set at MINUS 1.5% (set by the government) and that this funded by gains being capped at 2.24% (set by the LA within the guidelines from the government). The cap was 2.46% in 2015-16.

2.8 The base transfer of £0.214 million from the Schools Block to High Needs Block in support of the PRU funding is suspended for 2016-17 and is to be met from underspends in the High Needs Block for this year only.

2.9 Appendix A provides a comparison between overall funding for 2015-16 and 2016-17.

2.10 Appendix B1 and B2 set out the LFF for primary and secondary schools respectively.

2.11 Appendix C shows pupil characteristics per school.

2.12 Appendix D provides final Growth Fund allocations for 2016-17.

2.13 Appendix E provides a comparison of funding from factors 2015-16 and 2016-17

Growth Fund

A query was raised on why the numbers on roll (NOR) for Highams Park School is so high (*Appendix E2 Secondary variances*). It was agreed the Finance service will report back with a response

Votes:

Recommendation 2.4 (this is subject to the confirmation for Highams Park School and the class size protection).

For: 14

Against: 0

Abstention: 3

Schools Forum agreed:

2.4 The Growth Fund allocations for 2016-17 as set out in Appendix D

Maintained Primary schools were asked to agree that the Local Authority continues to hold the balance on the maintained primary contingency of £182,823

Votes:

For: 4

Against: 0 (not applicable)

Abstention: 0 (not applicable)

Decision:

2.14 Primary maintained schools **agreed** to the Local Authority continuing to hold the balance on the maintained primary contingency of £182,823

<http://www.walthamforest.gov.uk/schoolsforum> - **Agenda Item 5**

6. High Needs Block 2016-17: Funding and Proposed Allocation to Schools, PRUs and Further Education Providers

This report is a follow up to the November meeting regarding the funding for 2015-16 and a forecast for 2016-17. It is an indication to the distribution of the High Needs Block. The Education Funding Agency (EFA) confirmed the allocation.

- The available DSG for FY 2016-17 is **£31.961m**
- Schools Forum were asked to note the allocation from the underspend to the distribution as outlined in paragraphs 2.2.1 – 2.2.9
- In Special schools there is an increase of 46 due to the EFA regulations for places commissioned by other boroughs.
- There is reduction in the number of places in independent schools due to better provision closer to home
- The special resource provision is just over 80% occupancy rate
- The High Needs Inclusion Group will review the distribution of the funding

There were no further questions or comments

Votes:

2.2.1-2.2.9:

For: 16

Against: 0

Abstention: 0

DECISION

Schools Forum noted:

2.2.1 That the DSG HNB allocation from EFA for FY 2016-17 is **£34.799m**

2.1.2 That after deductions for Special Academies and adjustments for inter block transfers; and brought forward balances from 2015-16, the available DSG for FY 2016-17 is **£31.961m**

Schools Forum agreed:

The distribution of funding as shown in Appendix A as set out below:

2.2.1 £9.938m (exclusive of £6.670m for EFA payments to Special Academies and Post 16 Maintained Special School) for high needs provision in Special Schools

2.2.2 £3.477m (exclusive of £0.714m for EFA payments to Academy Special Resource Provision) for SRPs in mainstream schools

2.2.3 £4.583m for mainstream and early years providers (including in year adjustments for under 5s and 5-16 year olds)

2.2.4 £0.847m for Post-16 FE Providers

2.2.5 £3.478m for Alternative provision and PRUs

2.2.6 £3.714m for SEN placements in Independent and out of Borough schools

2.2.7 £1.090m (exclusive of £0.363m for EFA payments to Special School Academies and Post 16 Maintained Special School) for commissioned SEN support services to schools

2.2.8 £1.102m for centrally held support services such as Social Inclusion to support behaviour and Early Years SEND inclusion service.

2.2.9 £3.732m to be determined by Inclusion Group including the use of contingency and further support for pupils with High Needs. £0.214m of this has been agreed on a one year basis to allocate to cover the increase in expenditure on the Schools Block as a result of the EFA requirement to increase the cost of the commission PRU place element from £8k to £10k.

7 Further Feedback from Early Years Task and Finish Group

This report outlines the feedback from the Task and Finish group regarding the Early Years Single Funding Formula (EYSFF) 2016-17.

- The consultation was provided by a Survey Monkey questionnaire which there were 55 respondents
- The outcome is outlined in Appendix A
- Key information from the Chancellor's spending review can be found in Appendix B
- The Group met on 2nd December to review the spending review
- The original proposal was to keep the base rate
- There was a suggestion to agree to increase the rate of a Senior Child Protection and Safeguarding Adviser to 1FTE to be funded by schools via pooled DSG funding
- In 2016-17 new national living wage will come into force for workers aged 25 and over from April 2016

There were no further questions or comments

Votes:

2.1-2.3:

For: 17

Against: 0

Abstention: 0

DECISION

Schools Forum agreed:

2.1 A final consultation on the Early Years Single Funding Formula will be undertaken in late January/early February 2016.

2.2 This final consultation will not include questions where there was an agreement rate of 70% + to the consultation in November 2015 (Appendix A).

2.3 £0.500m of the 2014-15 Early Years underspend be allocated to increase the new 2016-17 base rate (produced via the final consultation in January 2016) by 4% and that this allocated be based on:

- a one off additional 2016-17 quality payment of 2.5% of the 2016-17 base rate. This rate would not be payable beyond March 2017, when the national increase in EYSFF funding via the new Early Years National Funding Formula (EYNFF) comes into effect.
- a 1.5% increase to the base rate.

This increase would be in advance of the EYNFF increase, which will need to be taken into consideration when the 2017-18 EYNFF is published.

2.4 The Early Years Task & Finish Group undertake the following:

2.4.1 Carry out further work on establishing premises costs such as lease, rental and mortgage costs that are unique to some providers, and consult on a tiered base rate which is based on costs obtained from the business rates team and providers.

2.4.3 Explore the possibility of funding 2 fte Senior Child Protection & Safeguarding Advisor posts from 2016-17, 1 fte funded via the Early Years Block (EYB), which has already been agreed via consultation with providers, and 1 fte funded by schools via pooled DSG funding.

2.4.4 Carry out further work, in partnership with the Inclusion Service with regards to payments made via the EYB in respect of supporting children with SEND as outlined in 5.2.5 below.

2.4.5 LA officers and Health to provide further details of the support, advice and training that will be funded via the centrally element of the EYB, based on the consultation results (Appendix A) and service needs/priorities. Indicative budget allocations are outlined in Appendix C.

2.4.6 Report back to Schools Forum in February 2016 on the final consultation outcome and recommendations for the 2016-17 EYSFF, use of centrally retained Early Years funding and use of 2014-15 underspend.

8 Trade Union Facility Time

The report provides the opportunity for Primary and Secondary maintained schools to de-delegate funding for Trade Union Facility Time.

The trade unions conduct regular meetings and are satisfied with the good relationships between them and the schools.

There were no further comments.

Votes:

Maintained Primary:

For: 4

Against: 0

Abstention: 0

DECISION

Voting members of Schools Forum, who are Governors and Headteachers of maintained Primary schools agreed to de-delegate Trade Union Facility Time funding of £2.72 per pupil (£42,633)

Votes:

Maintained Secondary:

Zoe Cozens, Headteacher from Heathcote is attending and has delegated voting powers on behalf of John Hernandez from Norlington School for Boys

For: 3

Against: 0

Abstentions: 0

DECISION

Voting members of Schools Forum, who are Governors and Head Teachers of maintained secondary schools only, agreed to de-delegate Trade Union Facility Time funding of £2.72 per pupil (£26,041)

9 Occupational Health Services De-Delegation for 2016-17

This report provides the opportunity for Primary and Secondary maintained schools to de-delegate funding for Occupational Health services.

Question:

How do we decide 10p is the differential regarding per pupil addition? **Response:** This is on the basis on the reflection of costs involved.

Votes:

Maintained Primary:

For: 4

Against: 0

Abstentions: 0

DECISION:

Voting members of Schools Forum, who are Governors and Head Teachers of maintained primary schools agreed to de-delegate Occupational Health funding of £3.68 per pupil (£57,680)

Maintained Secondary:

For: 4

Against: 0

Abstentions: 0

DECISION:

Voting members of Schools Forum, who are Governors and Head Teachers of maintained secondary schools only, agreed to de-delegate Occupational Health funding of £3.68 per pupil (£35,232)

10 Vacancy for Academy Representative (Secondary)

Jon Ashwell, School Business Manager from Highams Park School has resigned from the school to take up an appointment within another local authority. It is up to the Academy constituent to nominate a representative and it need not be a Headteacher. Jon provided valuable contribution to Schools Forum and wishes him well.

The Clerk will write to all Academies inviting them to elect a nominated person. If Schools Forum does not appoint a representative by April, Schools Forum must appoint someone by the June meeting.

11 Next phase of relationship between Schools and the Local Authority: development of an Educational Trust

The Chancellor's Spending Review outlines some important messages regarding financial implications to the Local Authority. This is an opportunity for all constituents to work more closely together.

The Deputy Chief Executive for Families met with Sam Gyimah MP, Parliamentary Under Secretary of State for Education and Childcare yesterday to discuss the Fairer Funding and what would it mean for schools. This is also a good opportunity for more collaboratively working between Headteachers and schools.

12 Any Other Business

There will be an organised Labour event on 6th February if anyone is interested in attending.

13 Date of next meeting

The next meeting shall be taking place on **Wednesday 10 February** at **5:30pm** (light refreshments from 5:00pm)

Venue: Committee Room 3

Schools Forum 13 January 2016: Summary of Decisions

Schools Forum met on 13 January 2015. There were six reports considered at the meeting, numbered as:

4. DSG Funding Blocks 2016-17
5. Local Funding Formula and Growth Fund Allocations for 2016-17
6. High Needs Block 2016-17: Funding and Proposed allocation to Schools, PRUs and Further Education Providers
7. Further Feedback from Early Years Task and Finish Group
8. Trade Union Facility Time De-delegation for 2016-17
9. Occupational Health Services De-delegation for 2016-17

Please see below for a summary of Schools Forum decisions. We invite and encourage all constituents to contact their representatives on Schools Forum by the end of January if they have any comments on these decisions, so that these comments can be considered by Schools Forum and the Local Authority at the next meeting on 10 February 2016. A list of representatives can be found as an appendix to this document.

All Schools Forum reports and minutes are published at:

<http://www.walthamforest.gov.uk/pages/services/schools-forum.aspx>

Duncan Pike, Strategic Finance Advisor

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Schools Block and Early Years Block: rishi.peetamsingh@walthamforest.gov.uk 020 8496 6304

Inclusion, Early Help and High Needs Block: shehwar.sultan@walthamforest.gov.uk 020 8496 6322



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Schools Forum 13 January 2016

Summary of Decisions

4. DSG Funding Blocks 2016-17

Schools Forum noted:

- The Dedicated Schools Block (DSG) funding for each of the three funding blocks for 2016-17 as announced by the DfE on 17th December 2015 as shown in table 1.
- The latest control total for 2015-16 as shown in Appendix A.

Schools Forum approved:

- The inter-block transfers as set out in Table 2.

5. Local Funding Formula and Growth Fund Allocations for 2016-17

Schools Forum agreed that:

- 2 The AWPU for primary schools is raised by £10.50 to £3,450.50.
- 3 Rates for 2016-17 are the actual rates for 2015 adjusted upwards by 1%.
- 4 PFI allocations for 2016-17 are those for 2015-16 adjusted upwards for 2.5%.
- 5 The Growth Fund allocations for 2016-17 as set out in Appendix D, **subject to confirmation with individual schools.**

Schools Forum noted that:

- The AWPU for secondary schools is unchanged at £4,760.
- Deprivation proportions from 2015-16 are retained for each sector in 2016-17. For primary schools this is 7.8% or £8.51m and for secondary 13.5% or £11.20m.
- The minimum funding guarantee is set at MINUS 1.5% (set by the government) and that this funded by gains being capped at 2.24% (set by the LA within the guidelines from the government). The cap was 2.46% in 2015-16.
- The base transfer of £0.214 million from the Schools Block to High Needs Block in support of the PRU funding is suspended for 2016-17 and is to be met from underspends in the High Needs Block for this year only.

- Appendix A provides a comparison between overall funding for 2015-16 and 2016-17.
- Appendix B1 and B2 set out the LFF for primary and secondary schools respectively.
- Appendix C shows pupil characteristics per school.
- Appendix D provides final Growth Fund allocations for 2016-17.
- Appendix E provides a comparison of funding from factors 2015-16 and 2016-17

Voting members of Schools Forum, who are Governors and Head Teachers of maintained primary schools only, agreed:

- That the LA continues to hold the balance on the maintained primary contingency of £182,823.

6. High Needs Block 2016-17: Funding and Proposed allocation to Schools, PRUs and Further Education

Schools Forum noted:

- That the DSG HNB allocation from EFA for FY 2016-17 is £34.799m.
- That after deductions for Special Academies and adjustments for inter block transfers; and brought forward balances from 2015-16, the available DSG for FY 2016-17 is £31.961m

Schools Forum approved the distribution of funding as shown in Appendix A as set out below:

- £9.938m (exclusive of £6.670m for EFA payments to Special Academies and Post 16 Maintained Special School) for high needs provision in Special Schools
- £3.477m (exclusive of £0.714m for EFA payments to Academy Special Resource Provision) for SRPs in mainstream schools
- £4.583m for mainstream and early years providers (including in year adjustments for under 5s and 5-16 year olds)
- £0.847m for Post-16 FE Providers
- £3.478m for Alternative provision and PRUs
- £3.714m for SEN placements in Independent and out of Borough schools

- £1.090m (exclusive of £0.363m for EFA payments to Special School Academies and Post 16 Maintained Special School) for commissioned SEN support services to schools
- £1.102m for centrally held support services such as Social Inclusion to support behaviour and Early Years SEND inclusion service.
- £3.732m to be determined by Inclusion Group including the use of contingency and further support for pupils with High Needs. £0.214m of this has been agreed on a one year basis to allocate to cover the increase in expenditure on the Schools Block as a result of the EFA requirement to increase the cost of the commission PRU place element from £8k to £10k.

7. Further Feedback from Early Years Task and Finish Group

Schools Forum agreed that:

- A final consultation on the Early Years Single Funding Formula will be undertaken in late January/early February 2016.
- This final consultation will not include questions where there was an agreement rate of 70% + to the consultation in November 2015 (Appendix A).
- £0.500m of the 2014-15 Early Years underspend be allocated to increase the new 2016-17 base rate (produced via the final consultation in January 2016) by 4% and that this allocated be based on:
 - A one off additional 2016-17 quality payment of 2.5% of the 2016-17 base rate. This rate would not be payable beyond March 2017, when the national increase in EYSFF funding via the new Early Years National Funding Formula (EYNFF) comes into effect.
 - A 1.5% increase to the base rate.
 - This increase would be in advance of the EYNFF increase, which will need to be taken into consideration when the 2017-18 EYNFF is published.
- The Early Years Task & Finish Group undertake the following:
 - Carry out further work on establishing premises costs such as lease, rental and mortgage costs that are unique to some providers, and consult on a tiered base rate which is based on costs obtained from the business rates team and providers.
 - Explore the possibility of funding 2 fte Senior Child Protection & Safeguarding Advisor posts from 2016-17, 1 fte funded via the Early Years

Block (EYB), which has already been agreed via consultation with providers, and 1 fte funded by schools via pooled DSG funding.

- Carry out further work, in partnership with the Inclusion Service with regards to payments made via the EYB in respect of supporting children with SEND as outlined in 5.2.5 below.
- LA officers and Health to provide further details of the support, advice and training that will be funded via the centrally element of the EYB, based on the consultation results (Appendix A) and service needs/priorities. Indicative budget allocations are outlined in Appendix C.
- Report back to Schools Forum in February 2016 on the final consultation outcome and recommendations for the 2016-17 EYSFF, use of centrally retained Early Years funding and use of 2014-15 underspend.

8. Trade Union Facility Time De-delegation for 2016-17

Voting members of Schools Forum, who are Governors and Head Teachers of maintained primary schools only, agreed:

- To de-delegate Trade Union Facility Time funding of £2.72 per pupil (£42,633)

Voting members of Schools Forum, who are Governors and Head Teachers of maintained secondary schools only, agreed:

- To de-delegate Trade Union Facility Time funding of £2.72 per pupil (£26,041)

9. Occupational Health Services De-delegation for 2016-17

Voting members of Schools Forum, who are Governors and Head Teachers of maintained primary schools only, agreed:

- To de-delegate Occupational Health funding of £3.68 per pupil (£57,680)

Voting members of Schools Forum, who are Governors and Head Teachers of maintained secondary schools only, agreed:

- To de-delegate Occupational Health funding of £3.68 per pupil (£35,232)

Appendix - Schools Forum Membership

Schools Representatives – Maintained Schools	
Primary Headteachers	Jane Harris (Edinburgh) Kate Jennings (Mission Grove) Lindsey Lampard (Chingford CofE) Maureen Okoye (Davies Lane) <i>Vice-Chair</i>
Primary Governors*	Greta Akpeneye (Thorpe Hall) Cllr Aktar Beg (Edinburgh) Thomas Goodall (Edinburgh)
Secondary Headteachers	John Hernandez (Norlington) Lynette Parvez (Kelmescott) Shona Ramsay (The Lammas) <i>Chair</i>
Secondary Governors*	Ian Moyes (Heathcote)
Schools Representatives – Academies and Free Schools	
Primary	Matts Hanks (Roger Ascham) Lynn Harrowell (Larkswood) Anne Powell (Riverley)
Secondary	Mark Morrall (Rushcroft / Chingford Foundation) Jon Ashwell (Highams Park)
School Representatives – Other	
Nursery	Sandra Campbell (Church Hill)
Special School and Special Academies	Gary Pocock (Hornbeam Academy)
PRU	Julian Lee (Hawkswood Group)
Non School Members	
Early Years Providers	Sarah Kendrick (Redwood Pre-School)
16-19 Providers	Paolo Ramello (Sir George Monoux college)
Trade Unions	Steve White (NUT)
Diocesan	Moira Bishop (Brentwood Diocese)

*A Community Forum for Chairs of Governing Bodies and the Governor Representatives has been set up on The Hub: <https://thehubcommunity.walthamforest.gov.uk/groups/chairs-governors-waltham-forest>

LONDON BOROUGH OF WALTHAM FOREST

Meeting / Date	SCHOOLS FORUM 10 February 2016	Agenda Item	3.1
Report Title	Update on Local Funding Formula for 2016-17		
Decision/ Discussion/ Information	For Information		
Report Author/ Contact details	Rishi Peetamsingh: Group Accountant-Schools 0208 496 6304 rishi.peetamsingh@walthamforest.gov.uk Duncan Pike, Strategic Finance Advisor 020 8496 3502 duncan.pike@walthamforest.gov.uk		
Appendices	Appendix A – Comparison of overall school funding 2015-16 and 2016-17 Appendix B1 - Primary LFF Appendix B2 - Secondary LFF Appendix C - Pupil Data Appendix D - Comparison of funding from factors 2015-16 and 2016-17 (D1 Primary, D2 Secondary)		

1. SUMMARY

- 1.1 This report updates Schools Forum on the proposed allocation of funding for 2016-17 for the Schools Block. These allocations are for all mainstream schools in the Local Authority area with pupils aged 5 to 16 years. It amends the report submitted in January 2016 to take account of errors in pupil characteristics.

2. RECOMMENDATIONS

Schools Forum to note that:

- 2.1 The AWPU for primary schools is raised by **£31.50** (previously £10.50) to **£3,482.00** (previously £3,450.50).
- 2.2 The minimum funding guarantee remains set at MINUS 1.5% (set by the government) and that this is funded by gains being capped at **1.25%** (previously **2.24%**).
- 2.3 Appendix A provides a revised comparison between overall funding for 2015-16 and 2016-17.
- 2.4 Appendix B1 and B2 set out the revised LFF for primary and secondary schools respectively.
- 2.5 Appendix C shows the revised pupil characteristics per school.
- 2.6 Appendix D provides a revised comparison of funding from factors 2015-16 and 2016-17.

3. REASON

- 3.1 Since the report to Schools Forum on 13 January was written, the LA was alerted by the EFA to two errors the EFA had made on the Authority Pro Forma Tool (APT) in pupil characteristics. Further checking of the APT revealed several other errors. This has meant that the Local Funding Formula has had to be re-calculated prior to final submission.
- 3.2 The APT was resubmitted on 29 January 2016 and should now be regarded as the final version. The appendices listed above are drawn from that final version and match the individual budget statements sent to schools.

4. CONSULTATION

- 4.1 The LA has consulted schools and academies on issues relating to the LFF through the Schools Block Task and Finish Group whose recommendations were agreed by Schools Forum on 16 September 2015. Schools Forum agreed the outcome of the September recommendations on 13 January. This report updates the January report to match the final APT submission.

Appendix A - Summary of the overall change in funding for 5-16 Year Olds between 2016-17 and 2015-16

SECONDARY	2016-17							2015-16							Difference	% change	
	NOR	LFF	MFG ADJ	Growth Fund	High Needs Block	Pupil Premium	TOTAL	NOR	LFF	MFG ADJ	Growth Fund	High Needs Block	Pupil Premium	TOTAL			
	A	B	C	D	E	F	G	H	I	J	K	L	M	N			O
Maintained Schools						£ 935											
All-through:																	
4000 Buxton	1508	£ 8,054,691	£ 125,407	£ 73,074	£ 422,246	£ 705,540	£ 9,380,958	1462	£ 7,903,458	£ 68,443	£ 100,341	£ 400,430	£ 705,540	£ 9,178,212	£ 202,746	2.21%	
4062 George Mitchell	849	£ 4,895,933	£ 109,510	£ 113,527	£ 23,347	£ 411,180	£ 5,553,496	900	£ 5,358,035	£ 13,802	£ 94,505	£ 33,280	£ 411,180	£ 5,910,802	-£ 357,306	-6.04%	
TOTAL	2,357	£ 12,950,624	£ 234,917	£ 186,600	£ 445,593	£ 1,116,720	£ 14,934,454	2362	£ 13,261,493	£ 82,245	£ 194,846	£ 433,710	£ 1,116,720	£ 15,089,014	-£ 154,560	-1.02%	
4060 Frederick Bremer	852	£ 5,917,826	-£ 13,736		£ 537,639	£ 461,890	£ 6,903,620	879	£ 5,881,213	£ -	£ -	£ 493,353	£ 461,890	£ 6,836,456	£ 67,164	0.98%	
4063 Heathcote	863	£ 5,702,328	£ -		£ 308,221	£ 306,680	£ 6,317,229	889	£ 5,770,626	£ -	£ -	£ 307,420	£ 306,680	£ 6,384,726	-£ 67,497	-1.06%	
4064 Norlington Boys	512	£ 3,327,750	£ 81,752		£ 56,694	£ 224,400	£ 3,690,596	504	£ 3,316,081	£ 89,741	£ -	£ 36,277	£ 224,400	£ 3,666,499	£ 24,097	0.66%	
4066 Willowfield	719	£ 4,610,621	£ 38,290	£ 186,203	£ 148,058	£ 267,410	£ 5,250,583	656	£ 4,082,548	£ 61,250	£ 247,786	£ 93,424	£ 267,410	£ 4,752,418	£ 498,164	10.48%	
4069 Leytonstone	837	£ 5,073,648	£ -		£ 46,460	£ 319,770	£ 5,439,878	854	£ 5,211,756	£ -	£ -	£ 55,204	£ 319,770	£ 5,586,730	-£ 146,851	-2.63%	
4072 Walthamstow School for Girls	896	£ 5,468,990	£ -		£ 69,807	£ 307,615	£ 5,846,412	898	£ 5,495,462	£ -	£ -	£ 79,420	£ 307,615	£ 5,882,497	-£ 36,085	-0.61%	
4075 Kelmscott	866	£ 5,482,988	£ -		£ 86,456	£ 403,920	£ 5,973,364	879	£ 5,503,570	£ -	£ -	£ 103,154	£ 403,920	£ 6,010,645	-£ 37,280	-0.62%	
4076 The Lammas	728	£ 5,432,271	£ 111,246		£ 19,913	£ 312,290	£ 5,875,720	703	£ 5,333,299	£ 103,457	£ 60,690	£ 32,960	£ 312,290	£ 5,842,695	£ 33,024	0.57%	
4603 Holy Family	895	£ 5,330,591	£ 43,656		£ 84,366	£ 255,255	£ 5,713,868	886	£ 5,399,985	£ -	£ -	£ 92,743	£ 255,255	£ 5,747,983	-£ 34,115	-0.59%	
TOTAL	7,168	£ 46,347,015	£ 261,208	£ 186,203	£ 1,357,614	£ 2,859,230	£ 51,011,270	7148	£ 45,994,539	£ 254,448	£ 308,476	£ 1,293,956	£ 2,859,230	£ 50,710,649	£ 300,622	0.59%	
Academies:																	
4001 Rushcroft	585	£ 3,707,252	£ -		£ 53,327	£ 253,385	£ 4,013,964	630	£ 4,025,984	£ -	£ -	£ 63,444	£ 253,385	£ 4,342,813	-£ 328,850	-7.57%	
4061 Connaught School for Girls	592	£ 3,490,649	£ -		£ 53,210	£ 202,895	£ 3,746,754	594	£ 3,526,072	£ 24,753	£ -	£ 23,230	£ 202,895	£ 3,776,950	-£ 30,196	-0.80%	
5400 Highams Park	1180	£ 6,565,627	£ -	£ 69,514	£ 165,259	£ 289,850	£ 7,090,250	1146	£ 6,283,409	£ -	£ 75,041	£ 162,303	£ 289,850	£ 6,810,603	£ 279,647	4.11%	
5401 Chingford	1181	£ 6,793,410	-£ 143,824		£ 591,729	£ 370,260	£ 7,611,575	1187	£ 6,533,860	-£ 68,572	£ -	£ 526,691	£ 370,260	£ 7,362,239	£ 249,337	3.39%	
4002 Eden Girls'	252	£ 1,659,140	-£ 29,796	£ 350,536	£ 14,990	£ 59,840	£ 2,054,709	152	£ 1,356,316	£ -	£ 336,202	£ 8,744	£ 59,840	£ 1,761,102	£ 293,607	16.67%	
6905 Walthamstow Academy	870	£ 5,465,207	£ -		£ 103,205	£ 466,565	£ 6,034,977	886	£ 5,594,257	£ -	£ -	£ 76,103	£ 466,565	£ 6,136,925	-£ 101,948	-1.66%	
TOTAL	4,660	£ 27,681,285	-£ 173,621	£ 420,050	£ 981,720	£ 1,642,795	£ 30,552,229	4595	£ 27,319,898	-£ 43,819	£ 411,243	£ 860,516	£ 1,642,795	£ 30,190,633	£ 361,596	1.20%	
GRAND TOTAL	14,185	£ 86,978,924	£ 322,504	£ 792,853	£ 2,784,927	£ 5,618,745	£ 96,497,953	14105	£ 86,575,930	£ 292,874	£ 914,565	£ 2,588,181	£ 5,618,745	£ 95,990,295	£507,658.04	0.53%	
Primary and Secondary	37,330	£ 191,951,139	£0	£ 2,949,764	£ 7,196,572	£ 14,815,845	£ 216,913,319	36832	£ 189,461,388	-£ 2	£ 3,578,119	£ 6,998,385	£ 14,815,845	£ 214,853,736	£1,738,015.07	0.81%	

Appendix B2 - Local Funding Formula Calculations for Secondary Schools in 2016-17

Secondary	NOR	AWPU	FSM6	IDAC1 1	IDAC1 2	IDAC1 3	IDAC1 4	IDAC1 5	EAL 3	Low Attainment	Mobility	Lump Sum	Split Site	Rates	PFI	Total
	A	B	C	D	E	F	G	H	J	K	L	M	N	O	P	Q
		£4,760	£1,437	£100	£150	£500	£500	£500	£800	£600	£1,000	£125,000				
Maintained																
All-through:																
4000 Buxton	746	£ 3,550,960	£ 514,094	£ 9,189	£ 34,533	£ 107,701	£ 56,815	£ 1,976	£ 103,033	£ 146,111	£ -	£ 36,637	£ 15,000	£ 34,870	£ -	£ 4,610,919
4062 George Mitchell	512	£ 2,437,120	£ 368,540	£ 15,900	£ 12,600	£ 38,000	£ 59,000	£ 2,000	£ 57,702	£ 145,106	£ 800	£ 14,854	£ 55,000	£ 97,490	£ -	£ 3,304,111
TOTAL	1258	£ 5,988,080	£ 882,633	£ 25,089	£ 47,133	£ 145,701	£ 115,815	£ 3,976	£ 160,735	£ 291,217	£ 800	£ 51,491	£ 70,000	£ 132,360	£ -	£ 7,915,031
4060 Frederick Bremer	852	£ 4,055,520	£ 704,270	£ 29,737	£ 16,140	£ 121,295	£ 40,106	£ 14,184	£ 38,344.89	£ 136,320	£ -	£ 125,000	£ 40,000	£ 261,656	£ 335,255	£ 5,917,826
4063 Heathcote	863	£ 4,107,880	£ 466,458	£ 10,234	£ 21,846	£ 185,491	£ 19,189	£ 3,444	£ 7,093.15	£ 118,372	£ -	£ 125,000	£ -	£ 272,018	£ 365,303	£ 5,702,328
4064 Norlington Boys	512	£ 2,437,120	£ 347,596	£ 14,400	£ 13,950	£ 50,000	£ 29,000	£ 1,500	£ 44,172.55	£ 75,529	£ 2,800	£ 125,000	£ 110,000	£ 76,683	£ -	£ 3,327,750
4066 Willowfield	719	£ 3,422,440	£ 456,902	£ 16,345	£ 16,847	£ 122,340	£ 25,070	£ 19,053	£ 36,800.00	£ 95,369	£ -	£ 125,000	£ -	£ 274,455	£ -	£ 4,610,621
4069 Leytonstone	837	£ 3,984,120	£ 487,647	£ 13,716	£ 21,325	£ 74,089	£ 52,563	£ 3,504	£ 64,230.22	£ 115,226	£ -	£ 125,000	£ 40,000	£ 92,227	£ -	£ 5,073,648
4072 Walthamstow School for Girls	896	£ 4,264,960	£ 482,294	£ 26,830	£ 26,730	£ 121,135	£ 21,524	£ 5,006	£ 16,818.77	£ 93,877	£ -	£ 125,000	£ 40,000	£ 244,816	£ -	£ 5,468,990
4075 Kelmscott	866	£ 4,122,160	£ 617,232	£ 24,428	£ 33,489	£ 136,658	£ 26,030	£ 2,002	£ 52,180.76	£ 163,914	£ -	£ 125,000	£ 40,000	£ 139,895	£ -	£ 5,482,988
4076 Lammas	728	£ 3,465,280	£ 512,393	£ 18,800	£ 19,950	£ 118,000	£ 53,500	£ 4,500	£ 104,574.59	£ 171,868	£ 26,200	£ 125,000	£ -	£ 203,366	£ 608,839	£ 5,432,271
4603 Holy Family	895	£ 4,260,200	£ 401,911	£ 23,200	£ 17,700	£ 123,500	£ 61,000	£ 13,000	£ 21,672.65	£ 110,299	£ -	£ 125,000	£ 150,000	£ 23,109	£ -	£ 5,330,591
TOTAL	7168	£ 34,119,680	£ 4,476,703	£ 177,691	£ 187,977	£ 1,052,508	£ 327,981	£ 66,193	£ 385,888	£ 1,080,773	£ 29,000	£ 1,125,000	£ 420,000	£ 1,588,225	£ 1,309,397	£ 46,347,015
Academies:																
4001 Rushcroft	585	£ 2,784,600	£ 369,829	£ 13,323	£ 12,772	£ 104,178	£ 25,544	£ 16,027	£ 84,578	£ 115,208	£ 29,250	£ 125,000	£ -	£ 26,943	£ -	£ 3,707,252
4061 Connaught School for Girls	592	£ 2,817,920	£ 324,285	£ 14,024	£ 14,575	£ 32,054	£ 35,059	£ -	£ 16,000	£ 58,779	£ -	£ 125,000	£ 40,000	£ 12,953	£ -	£ 3,490,649
5400 Highams Park	1180	£ 5,616,800	£ 467,717	£ 16,857	£ 25,884	£ 69,324	£ 43,888	£ 1,496	£ 17,511	£ 132,186	£ -	£ 125,000	£ -	£ 48,963	£ -	£ 6,565,627
5401 Chingford	1181	£ 5,621,560	£ 571,442	£ 21,072	£ 25,433	£ 200,427	£ 23,032	£ 2,940	£ 16,603	£ 143,414	£ -	£ 125,000	£ -	£ 42,487	£ -	£ 6,793,410
4002 Eden Girls'	252	£ 1,199,520	£ 152,473	£ 5,422	£ 9,337	£ 38,151	£ 18,072	£ 2,008	£ 54,400	£ 19,938	£ -	£ 125,000	£ -	£ 34,818	£ -	£ 1,659,140
6905 Walthamstow	870	£ 4,141,200	£ 708,535	£ 15,500	£ 13,050	£ 196,000	£ 29,500	£ 74,500	£ 22,452	£ 91,025	£ -	£ 125,000	£ -	£ 48,445	£ -	£ 5,465,207
TOTAL	4660	£ 22,181,600	£ 2,594,282	£ 86,197	£ 101,051	£ 640,134	£ 175,095	£ 96,972	£ 211,544	£ 560,550	£ 29,250	£ 750,000	£ 40,000	£ 214,609	£ -	£ 27,681,285
	13086	£ 62,289,360	£ 7,953,618	£ 288,977	£ 336,161	£ 1,838,343	£ 618,890	£ 167,141	£ 758,166	£ 1,932,541	£ 59,050	£ 1,926,491	£ 530,000	£ 1,935,195	£ 1,309,397	£ 81,943,331

Appendix C - School Level Pupil Characteristics October 2015

Primary Schools	Primary FSM6	Primary IDACI 1	Primary IDACI 2	Primary IDACI 3	Primary IDACI 4	Primary IDACI 5	Primary IDACI 6	Primary EAL 3	Primary Mobility	Primary Low Attainment
Chase Lane Primary	0.28	0.09	0.37	0.31	0.07	0.00	0.00	0.27	0.00	0.19
Longshaw Primary	0.36	0.04	0.12	0.51	0.03	0.00	0.00	0.26	0.00	0.15
Whitehall Primary	0.38	0.07	0.08	0.57	0.02	0.00	0.00	0.14	0.00	0.26
Davies Lane Primary	0.21	0.16	0.22	0.12	0.10	0.01	0.00	0.38	0.01	0.10
Downsell Primary	0.43	0.22	0.09	0.41	0.11	0.00	0.00	0.50	0.01	0.25
Newport Primary	0.26	0.33	0.13	0.07	0.02	0.00	0.00	0.40	0.03	0.22
Chapel End Infants	0.24	0.53	0.28	0.11	0.01	0.02	0.00	0.63	0.00	0.24
Edinburgh Primary	0.29	0.29	0.41	0.16	0.01	0.01	0.00	0.39	0.04	0.20
Greenleaf Primary	0.25	0.59	0.14	0.18	0.02	0.02	0.00	0.26	0.00	0.14
Handsworth Primary	0.13	0.21	0.07	0.02	0.05	0.00	0.00	0.14	0.00	0.07
Thorpe Hall Primary	0.32	0.59	0.07	0.07	0.10	0.00	0.00	0.30	0.00	0.22
The Winns Primary	0.34	0.30	0.15	0.34	0.02	0.13	0.00	0.30	0.04	0.20
Woodford Green Primary	0.32	0.08	0.12	0.36	0.00	0.00	0.00	0.17	0.04	0.14
Oakhill Primary	0.15	0.19	0.17	0.03	0.04	0.00	0.00	0.10	0.00	0.15
Henry Maynard Primary	0.27	0.15	0.06	0.32	0.02	0.00	0.00	0.20	0.00	0.10
South Grove Primary	0.39	0.29	0.22	0.41	0.02	0.01	0.00	0.31	0.02	0.26
Dawlish Primary	0.24	0.44	0.26	0.07	0.03	0.00	0.00	0.37	0.02	0.20
Gwyn Jones Primary	0.17	0.16	0.21	0.02	0.03	0.00	0.00	0.29	0.00	0.19
George Tomlinson Primary	0.26	0.25	0.16	0.10	0.04	0.00	0.00	0.38	0.02	0.19
Mission Grove Primary	0.27	0.19	0.41	0.25	0.05	0.01	0.00	0.47	0.02	0.15
Coppermill Primary School	0.30	0.49	0.20	0.19	0.08	0.00	0.00	0.32	0.03	0.20
Stoneydown Park Primary	0.29	0.10	0.22	0.16	0.18	0.00	0.00	0.40	0.00	0.24
Parkside Primary School	0.41	0.17	0.12	0.45	0.03	0.00	0.00	0.30	0.03	0.21
The Jenny Hammond Primary	0.30	0.07	0.41	0.25	0.11	0.00	0.00	0.21	0.00	0.12
Ainslie Wood Primary	0.31	0.08	0.31	0.29	0.03	0.00	0.00	0.21	0.05	0.20
Barn Croft Primary	0.27	0.69	0.07	0.18	0.02	0.00	0.00	0.43	0.03	0.27
Mayville Primary School	0.39	0.21	0.14	0.27	0.24	0.00	0.00	0.37	0.00	0.14
Chingford C of E Primary	0.15	0.09	0.05	0.27	0.00	0.00	0.00	0.04	0.00	0.20
St Mary's Catholic Primary	0.10	0.07	0.03	0.24	0.01	0.00	0.00	0.07	0.00	0.12
St. Joseph's Catholic Junior	0.33	0.35	0.12	0.21	0.17	0.00	0.00	0.13	0.00	0.22
St. Saviour's C of E Primary	0.34	0.27	0.21	0.32	0.11	0.01	0.00	0.26	0.02	0.23
St Joseph's Catholic Infants	0.16	0.42	0.16	0.14	0.12	0.00	0.00	0.73	0.00	0.29
St. Mary's C of E Primary	0.19	0.34	0.11	0.25	0.06	0.00	0.00	0.13	0.02	0.13
Selwyn Primary	0.42	0.12	0.11	0.12	0.25	0.00	0.00	0.27	0.03	0.17
Our Lady and St George's Catholic Primary	0.25	0.26	0.13	0.34	0.07	0.00	0.00	0.19	0.00	0.13
St. Patricks Catholic Primary	0.23	0.17	0.19	0.35	0.11	0.03	0.00	0.38	0.00	0.14
Yardley Primary	0.26	0.14	0.15	0.40	0.00	0.00	0.00	0.12	0.00	0.09
Hillyfield Primary Academy	0.32	0.25	0.08	0.49	0.02	0.07	0.00	0.34	0.00	0.22
Willow Brook Primary Academy	0.43	0.37	0.10	0.20	0.27	0.01	0.00	0.39	0.03	0.24
The Woodside Primary Academy	0.43	0.24	0.12	0.41	0.13	0.00	0.00	0.45	0.02	0.26
Chapel End Junior Academy	0.37	0.53	0.29	0.10	0.01	0.01	0.00	0.17	0.00	0.17
Riverley Primary Academy	0.37	0.44	0.10	0.18	0.26	0.00	0.00	0.35	0.00	0.17
Sybourn Primary Academy	0.30	0.30	0.31	0.34	0.03	0.00	0.00	0.51	0.03	0.26
Larkwood Primary	0.33	0.25	0.21	0.33	0.03	0.00	0.00	0.18	0.00	0.13
Thomas Gamuel Academy	0.36	0.27	0.28	0.27	0.02	0.00	0.00	0.46	0.00	0.18
Roger Ascham Primary Academy	0.45	0.25	0.07	0.42	0.01	0.24	0.00	0.30	0.00	0.26
Chingford Hall Academy	0.53	0.03	0.11	0.40	0.39	0.01	0.00	0.30	0.00	0.25
Whittingham Primary Academy	0.36	0.12	0.02	0.63	0.02	0.18	0.00	0.33	0.00	0.24
Walthamstow Primary Academy	0.00	0.15	0.15	0.38	0.03	0.24	0.00	0.00	0.00	0.00
Barclay Primary Academy	0.30	0.18	0.17	0.18	0.07	0.01	0.00	0.35	0.00	0.18
Emmanuel Community Academy	0.34	0.29	0.27	0.28	0.04	0.01	0.00	0.46	0.06	0.20
Buxton	0.40	0.07	0.33	0.35	0.11	0.01	0.00	0.39	0.02	0.18
George Mitchell	0.36	0.26	0.18	0.10	0.41	0.00	0.00	0.45	0.01	0.21

Appendix C - School Level Pupil Characteristics October 2015

Secondary Schools	Secondary FSM	Secondary IDAC1 1	Secondary IDAC1 2	Secondary IDAC1 3	Secondary IDAC1 4	Secondary IDAC1 5	Secondary IDAC1 6	Secondary EAL 3	Secondary Mobility	Secondary Low Attainment
Buxton	0.48	0.12	0.31	0.29	0.15	0.01	0.00	0.17	0.01	0.33
George Mitchell	0.50	0.31	0.16	0.15	0.23	0.01	0.00	0.14	0.01	0.47
Frederick Bremer	0.58	0.35	0.13	0.28	0.09	0.03	0.00	0.06	0.00	0.27
Heathcote	0.38	0.12	0.17	0.43	0.04	0.01	0.00	0.01	0.00	0.23
Norlington Boys	0.47	0.28	0.18	0.20	0.11	0.01	0.00	0.11	0.01	0.25
Willowfield	0.44	0.23	0.16	0.34	0.07	0.05	0.00	0.06	0.00	0.22
Leytonstone	0.41	0.16	0.17	0.18	0.13	0.01	0.00	0.10	0.00	0.23
Walthamstow School for Girls	0.37	0.30	0.20	0.27	0.05	0.01	0.00	0.02	0.00	0.17
Kelmscott	0.50	0.28	0.26	0.32	0.06	0.00	0.00	0.08	0.00	0.32
The Lammas	0.49	0.26	0.18	0.32	0.15	0.01	0.00	0.18	0.04	0.39
Holy Family	0.31	0.26	0.13	0.28	0.14	0.03	0.00	0.03	0.00	0.21
Rushcroft	0.44	0.23	0.15	0.36	0.09	0.05	0.00	0.18	0.05	0.33
Connaught School for Girls	0.38	0.24	0.16	0.11	0.12	0.00	0.00	0.03	0.00	0.17
Highams Park	0.28	0.14	0.15	0.12	0.07	0.00	0.00	0.02	0.00	0.19
Chingford	0.34	0.18	0.14	0.34	0.04	0.00	0.00	0.02	0.00	0.20
Eden Girls	0.42	0.22	0.25	0.30	0.14	0.02	0.00	0.27	0.00	0.13
Walthamstow Academy	0.57	0.18	0.10	0.45	0.07	0.17	0.00	0.03	0.00	0.17

Secondary	NOR	AWPU	FSM6	IDAC1 1	IDAC1 2	IDAC1 3	IDAC1 4	IDAC1 5	IDAC1 6	EAL 3	Low Attainment	Mobility	Lump Sum	Split Site	Rates	PFI	Total	
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	L	M	N	
		£4,760	£1,437	£100	£150	£500	£500	£500	£0	£800	£600	£1,000	£125,000					
Maintained																		
All-through:																		
3204000	Buxton	11	£52,360	£111,886	£9,189	£34,533	£107,701	-£20,261	-£218,524	-£61,084	-£22,056	-£2,444	£0	£0	£0	£748	£0	-£7,953
3204062	George Mitchell	-51	-£242,760	£46,030	£15,900	£12,600	£38,000	£24,200	-£83,000	-£132,000	-£13,498	-£22,208	£800	£0	£0	-£1,868	£0	-£357,804
3204060	Frederick Bremer	-8	-£38,080	£121,763	£29,737	£16,140	£121,295	-£48,150	-£116,238	-£97,081	£3,906	-£10,467	£0	£0	£40,000	£5,611	£8,178	£36,614
3204063	Heathcote	-14	-£66,640	£63,884	£10,234	£21,846	£185,491	-£62,981	-£141,735	-£82,959	£671	-£9,659	£0	£0	£0	£2,312	£11,238	-£68,298
3204064	Norlington Boys	8	£38,080	£54,712	£14,400	£13,950	£50,000	-£9,000	-£84,500	-£42,000	-£10,444	-£5,373	-£9,800	£0	£0	£1,644	£0	£11,669
3204066	Willowfield	63	£299,880	£104,689	£16,345	£16,847	£122,340	-£78,446	-£70,219	-£30,092	-£7,267	£2,184	£0	£0	-£40,000	£191,811	£0	£528,073
3204069	Leytonstone	-17	-£80,920	£66,716	£13,716	£21,325	£74,089	-£19,776	-£111,032	-£93,438	-£722	-£10,043	£0	£0	£0	£1,978	£0	-£138,107
3204072	Walthamstow School for Girls	-2	-£9,520	£81,828	£26,830	£26,730	£121,135	-£59,857	-£129,294	-£63,141	-£19	-£9,936	£0	£0	£0	-£11,229	£0	-£26,472
3204075	Kelmscott	-13	-£61,880	£88,592	£24,428	£33,489	£136,658	-£61,570	-£162,998	-£39,000	£20,108	£1,127	£0	£0	£0	£464	£0	-£20,582
3204076	Lammas	25	£119,000	£101,684	£18,800	£19,950	£118,000	-£24,142	-£121,215	-£79,955	-£25,581	-£16,279	-£30,500	£0	£0	£4,361	£14,850	£98,973
3204603	Holy Family	9	£42,840	£49,874	£23,200	£17,700	£123,500	-£28,803	-£146,360	-£141,319	-£803	-£9,717	£0	£0	£0	£495	£0	-£69,393
3204001	Rushcroft	-45	-£214,200	£6,038	£13,323	£12,772	£104,178	-£45,883	-£68,240	-£81,258	-£21,696	-£22,093	-£2,250	£0	£0	£578	£0	-£318,732
3205401	Eden Girls'	30	£140,070	£113,014	£5,422	£9,337	£38,151	£5,672	-£36,992	-£15,000	£20,000	£8,331	£0	£0	£0	£14,818	£0	£302,823
3204002	Connaught School for Girls	-2	-£9,520	£46,740	£14,024	£14,575	£32,054	-£541	-£69,000	-£51,000	-£2,400	-£10,633	£0	£0	£0	£277	£0	-£35,424
3204061	Highams Park	40	£190,400	£105,274	£16,857	£25,884	£69,324	£27,930	-£103,228	-£55,354	£8,695	-£4,614	£0	£0	£0	£1,050	£0	£282,218
3205400	Chingford	19	£90,440	£138,016	£21,072	£25,433	£200,427	-£55,023	-£74,526	-£89,724	£3,177	-£652	£0	£0	£0	£911	£0	£259,550
3206905	Walthamstow	-16	-£76,160	£118,459	£15,500	£13,050	£196,000	-£97,043	-£107,706	-£172,695	-£2,376	-£15,850	£0	£0	£0	-£229	£0	-£129,050
		37	£173,390	£1,419,197	£288,977	£336,161	£1,838,343	-£553,673	-£1,844,807	-£1,327,100	-£50,307	-£138,324	-£41,750	£0	£0	£213,733	£34,266	£348,105

LONDON BOROUGH OF WALTHAM FOREST

Meeting / Date	SCHOOLS FORUM 10 February 2016	Agenda Item	5
Report Title	Early Years Funding Block : Provision for the free education for 2, 3 and 4 year olds for 2016-17 and Feedback from consultation		
Decision/ Discussion/ Information	For Discussion and Decision		
Report Author/ Contact details	Eve McLoughlin Head of Education Support Tel:- 020 8496 3576 eve.mcloughlin@walthamforest.gov.uk		
Appendices	Appendix A: Final indicative hourly rates for 2016-17 Appendix B: Final indicative budget shares for 2016-17 Appendix C: Provisional 2016-17 Centrally retained funding and 2014-15 carry forward underspend budgets Appendix D: Premises rates analysis Appendix E: Feedback from final consultation		

1. SUMMARY

- 1.1 This report sets out the following financial information in relation to the provision of free education for 2, 3 & 4 year olds:
- Total funding available for allocation to providers in 2016-17.
 - Final indicative budget shares for providers in 2016-17.
 - Proposed method for collecting pupil data and making payments to providers in 2016-17.

2 RECOMMENDATIONS

2.1 That Schools Forum:

- 2.1.1 Agrees that the Final indicative hourly rates and budget shares for 2016-17 as set out in **Appendix A and B** and the process for predicting budget shares as set out in section 5 should form the basis of monthly allocations to all Early Years providers in 2016-17.
- 2.1.2 Agrees with the proposed procedure for the collection of data and adjustment to budget shares in 2016-17 as set out in section 6.
- 2.1.3 Agrees to maintain the funding rate for 2 year olds at **£6.00** per hour for 2016-17. This will be subsidised in 2016-17 from a top up from the Early Years underspend and reviewed in 2017-18 when details of the new Early Years National Funding Formula (EYNFF) are available.
- 2.1.4 Agrees to the funding rates for 3 and 4 year olds as set out in Table 5 for 2016-17 and the control total for 2016-17 as set out in Table 2.
- 2.1.5 Agrees the provisional 2016-17 centrally retained funding and 2014-15 carry forward underspend budgets as set out **Appendix C**.

2.1.6 Notes the feedback from final consultation as set out in **Appendix E**.

2.1.7 Notes that final outturn figures for 2015-16 are not available currently for 2,3 & 4 year old funding, but that any overspend will be funded from the 2014-15 underspend (**Appendix C**).

3. REASON

3.1 The Local Authority is required to consult annually with Schools Forum on arrangements for Early Years provision.

4. BACKGROUND

4.1 **Table 1** sets out the Early Years Single Funding Formula (EYSFF) hourly rates for 3-4 year olds for 2015-16 as agreed by Cabinet on 17 March 2015, based on recommendations agreed by Schools Forum on 11 February 2015.

Table 1: 2015-16 Rates per pupil

Factor	
Base Funding	
PVI (<i>inclusive of a 15p premises supplement</i>)	£3.90 per hour
Nursery Classes	£3.75 per hour
LA Daycare Nursery (Snowberry)	£4.90 per hour
Nursery Schools	£6.04 per hour
Quality	
No Ofsted judgement or less than good	£0.00 per hour
Ofsted judgement of good – PVI & LA Daycare Nursery	£0.36 per hour
Ofsted judgement of good - Nursery class	£0.35 per hour
Ofsted judgement of good - Nursery school	£0.56 per hour
Ofsted judgement of outstanding – PVI & LA Daycare Nursery	£0.54 per hour
Ofsted judgement of outstanding - Nursery classes	£0.52 per hour
Ofsted judgement of outstanding - Nursery School	£0.83 per hour
Deprivation	
Pupil lives in IDACI Band 4	£0.25 per hour
Pupil lives in IDACI Band 5	£0.70 per hour
Pupil lives in IDACI Band 6	£1.00 per hour

4.2 Funding for 2016-17 within the Early Years Block is set out in **Table 2** below:

Table 2: Breakdown of Early Years Funding for 2, 3 & 4 year olds 2016-17

	£m
Early Years Place Funding for 3 Year olds	
DSG Early Years Block - January 2015 Schools and Early Years Census based on 2,962 fte 3-4 year olds at £4,884.45*	14.468
Early Years Centrally Retained Funding	-1.057
Transfer to School Block (Schools Business Rates)	-0.125
Transfer to High Needs Block <i>(Early Years staffing costs in integrated disability service- including Area SENCOs supporting PVI sector providers)</i>	-0.500
Top up from Early Years Underspend (to fund one off 16/17 increase to base rate of 4% in advance of the Early Years National Funding Formula in 17/18)	0.500
Top up from Early Years Underspend to fund a 1% contingency fund for any increase in delivery hours due to census anomalies and in year increases in quality payment	0.174
Sub Total	13.460
Early years Pupil Premium Funding for 3 Year Olds	
Extension of Pupil Premium to 3-4 year olds based on 1089 fte 3-4 year olds at £0.53p*	0.329
Sub Total	0.329
Early Years Place Funding for 2 Year olds	
DSG 2 Year Old funding based on 532 FTE at £5.28 per hour*	2.669
Top Up from Early Years Underspend to subsidise hourly rate by £0.72p per hour, from £5.28 to £6 per hour (based on delivering 570hrs per annum to 1200 children)	0.500
Sub Total	3.169
Control Total	16.948

Note *The final allocation for 2016-17 will be adjusted by the EFA based upon January 2016 Census data (5/12ths) + January 2017 Census data (7/12ths), and a balancing payment/clawback actioned in 17/18

4.3 The final indicative budget for 3 & 4 years olds 2016-17 (**Appendix B** includes an increase of 0.3% in the predicted number of hours delivered (2,881,008 in 2015-16 versus 2,888,682 in 2016-17, an increase of 7,674), and a 1% contingency (to cover Census anomalies and increases in quality payments due to increases in Ofsted Grades.

5. Predicted Budget Shares for 2016-17

- 5.1 The process for predicting annual hours was amended in 2015-16 which improved the accuracy of predictions and the level of under/over payments. The following adjustments are being recommended for 2016-17 to improve the efficiency of the process further:
- 5.1.1 We will use the actual hours delivered in the Summer term 2015 (April-August 2015) to predict actual hours of attendance for Summer 2016.
 - 5.1.2 We will use number of children recorded on the Autumn 2015 Census that have a eligible D.O.B for the Autumn Term Headcount 2015 (as outlined in the FEEE financial guidance) to predict actual hours of attendance for Autumn 2016.
 - 5.1.3 We will use number of children recorded on the Autumn 2015 Census that have a eligible D.O.B for the Spring Term 2016 (as outlined in the FEEE financial guidance) to predict actual hours of attendance for Spring 2017.
- 5.2 IDACI data is based on Autumn 2015 census data or in the absence of this data, ward average data will be used. Ward averages will also be used for childminders due to the small numbers of children provided a place by them.
- 5.3 Where a school has a DfE number recorded on Edubase and an Early Years Ofsted registration number, data pertaining to the Schools registration will be used to determine the schools budget share, where the age range of the school, as recorded on the Edubase system, includes 3 year olds. The Early Years Ofsted data will only be used where the where the age range of the school, as recorded on the Edubase system, does not include 3 year olds.
- 5.4 In line with the initial Early Years consultation outcome in November 2015 and subsequent report to School Forum in January 2016, the following has been incorporated into the funding formula:
- 5.4.1 The total predicted 2015-16 expenditure for deprivation, based on delivering 2,881,008 hours is **£542,164**, this is predicted to reduce to **£83,041** in 2016-17, a variance of **-£459,123**. This underspend has been reallocated to the base rate and has resulted in an uplift to the base rate of **16p** per hour. (£459,123 divided by 2,888,682 hours).
 - 5.4.2 An additional base rate supplement has been added for all providers for 2016-17, which is equivalent to a **1.5%** increase in the 2016-17 base rate. This additional supplement will only be paid for 2016-17 and will be revised as part of the local 2017-18 EYSFF when details of the EYNFF are made available.
 - 5.4.3 An additional quality rate supplement has been added for all providers for 2016-17, which is equivalent to a **2.5%** increase in the 2016-17 base rate. This additional supplement will only be paid for 2016-17 and will be revised as part of the local 2017-18 EYSFF when details of the new EYNFF are made available.
 - 5.4.4 The premises rate supplement for PVI sector providers is now shown separately (in 2015-16, this was included in the base rate).
 - 5.4.4.1 In order to calculate the payment band for each provider, information was collated from the LA's business rates team, in addition, details of lease and rental costs were obtained from some providers.

- 5.4.4.2 Information regarding the number of places the provider was registered by Ofsted to deliver, along with the number of delivery hours per annum were used to establish an hourly premises cost.
 - 5.4.4.3 For those providers that did not pay business rates and actual lease/rental costs had not been obtained, an average premises cost of **£6,000** per annum (shown in red on **Appendix D**) was used. This was based on 50% of an annual lease/rental charge of £12,000 as in most instances utilities were included in the agreement.
 - 5.4.4.4 For those providers that did pay business rates and actual lease/rental costs had not been obtained, an average premises cost of **£20,000** per annum (shown in red on **Appendix D**). This average cost was based on actual costs that had been obtained.
 - 5.4.4.5 This exercise identified that the vast majority of providers would fall into the high band payment. Base Funding Low – up to **5p** per hour Medium – **6-10p** per hour, High – **11p** to a max of **15p** per hour.
 - 5.4.4.6 The results of this analysis are outlined at **Appendix D**.
 - 5.4.4.7 It is therefore recommended that rather than officers requesting evidence of expenditure from over 70 providers, that all providers are paid at the high band level for 2016-17
 - 5.4.4.8 Further work will be carried out in 2017-18 to establish whether lease/rental agreements clearly outline which costs are included and which party is responsible for reactive and cyclical maintenance. This will assist in ensuring the accuracy of any premises/unit costing exercise carried out.
- 5.5 Further work will be carried out during 2016-17 to establish the unit cost of delivering a place in advance of the EYNFF which will inform the local EYSFF formula in 2017-18.
- 5.6 The overall hourly rate is a combination of base, premises, quality and deprivation rates. This makes it easy for a provider to calculate income based on actual hours recorded and adjust expenditure where necessary. **Appendix A** sets out the indicative hourly rate for all providers.
- 5.7 Predicted annual hours will be multiplied by the overall hourly rate for that provider to calculate their indicative budget share.
- 5.8 Local Authorities are required from 1 April 2015 to pay Early Years Pupil Premium (EYPP) to providers of the free entitlement. Eligible children aged 3 or 4 include those whose parents are in receipt of qualifying benefits for free school meals or who are looked after or who have been adopted from care or who have left care under a special guardianship order. The EYPP is child specific and will be paid at a rate of **53p**, in addition to the EYSFF hourly rate, for eligible pupils included in headcount returns. There is a budget allocation of **£329k** within the EYDSG to fund these payments.
- 5.9 **Appendix B** sets out the predicted budget shares for all Early Years providers.
- 6. Proposed method for collecting pupil data and making payments to providers in 2016-17.**
- 6.1 The Schools and Early Years Finance (England) Regulations 2014 which came into force in Jan 2015 require local authorities to take into account in its formula

the predicted total number of hours of attendance of pupils or children, using as a basis for the calculation the most recent data available about the actual numbers of pupils or children. When further information about hours of attendance becomes available a local authority must review the budget share and re-determine that budget share or amount allocated, as the case may be.

- 6.2 When carrying out a review and redetermination the local authority must use for the basis of the calculation the actual hours of such attendance in each of at least three sample weeks or the actual total number of hours of such attendance for the period. The local authority must give notice of the redetermination and the date on which it will be implemented within 28 days of the redetermination.
- 6.3 In order to meet this requirement in 2015-16, providers' were required to confirm the number of children on roll at the beginning of each term in order for their monthly budget share to be re-determined if required, and to release their monthly budget share. Data from the January and October Census was also reviewed, when it was available, in order to confirm the accuracy of the numbers given by providers at the beginning of the term.
- 6.4 An exercise was undertaken to establish whether there were significant differences between the number on roll on the January Census, and those reported by the provider in April, and whether there were significant differences between the number on roll on the Autumn Census, and those reported by the provider the following January. This exercise identified that in most instances there was minimal variance between figures provided at the beginning of the term and those provided as part of the Census returns.
- 6.5 It is therefore recommended that for 2016-17 the information outlined in Table 3 be used to determine if monthly budget shares need to be re-determined and **Appendix B** adjusted as necessary. An updated version of **Appendix B** will be uploaded to The Hub on a termly basis (during the first two weeks of the start of term). Schools and Providers will be made aware, via the Hub Early Years newsletter, and e-mail that updated information is available and asked to contact the LA to confirm numbers on roll by exception (where there are variances of plus or minus 5 children). This will allow the budget share to be amended to prevent significant under/overspends.
- 6.6 Data collated during the Census will also be used to prepopulate headcount returns for providers to assist in the accuracy, efficiency and timeliness of headcount returns.

Table 3: Data to be used to calculate predicted average number of children per term

Term	Term Dates	Data to be used
Summer Term	Apr-Aug16	January 16 Census Data
Autumn Term	September-Dec 16	Written Confirmation from provider of numbers on roll at beginning of September
Spring Term	Jan-Mar 17	Autumn 16 Census Data

7 CONSULTATION

- 7.1 Schools Forum agreed that Early Years providers should be consulted on whether the existing 2015-16 EYSFF and payment rates for 2, 3 & 4 year olds should remain the same for 2016-17.
- 7.2 The final consultation period ran between 22 January 2016 and 29 January 2016. An e-mail was sent to all early years providers (schools, day nurseries, pre-schools and childminders) on 22 January 2016 advising them of the consultation and a link to the online survey.
- 7.3 Budget shares for Early Years providers have been determined based on recommendations made by Schools Forum and taken account of the view of the Early Years Task & Finish group and the initial and final consultation with all providers as reported to the last meeting of Schools Forum on 13 January 16.

8. THE CONSULTATION OUTCOME

- 8.1 Full consultation details can be found at **Appendix E**

9. Proposed rates for 2016-17

Table 5 on the next page shows the proposed rates for 2016-17 taking into account consultation responses

Table 5 Proposed rates for 2016-17

Factor	
Base Funding	
PVI and Nursery Classes	£3.91 per hour*
LA Daycare Nursery (Snowberry)	£4.91 per hour*
Nursery Schools	£6.20 per hour*
Additional one off Base rate funding for 16/17 in advance of the 17/18 EYNFF paid at 1.5% of the base rate	As detailed in Appendix A
<i>*Includes an uplift of 16p per hour against 2015-16 base rates due to a reallocation of the deprivation budget</i>	
Premises	
PVI Sector providers	£0.15 per hour
Quality	
Additional one off Base rate funding for 16/17 in advance of the 17/18 EYNFF paid at 2.5% of the base rate	As detailed in Appendix A
No Ofsted judgement or less than good	£0.00 per hour
Ofsted judgement of good – PVI & LA Daycare Nursery	£0.36 per hour
Ofsted judgement of good - Nursery class	£0.35 per hour
Ofsted judgement of good - Nursery school	£0.56 per hour
Ofsted judgement of outstanding – PVI & LA Daycare Nursery	£0.54 per hour
Ofsted judgement of outstanding - Nursery classes	£0.52 per hour
Ofsted judgement of outstanding - Nursery School	£0.83 per hour
Deprivation	
Pupil lives in IDACI Band 4	£0.25 per hour
Pupil lives in IDACI Band 5	£0.70 per hour
Pupil lives in IDACI Band 6	£1.00 per hour

Appendix A: Final indicative hourly rates for 2016-17

OFSTED URN	Setting Name (As registered with OFSTED)	Predicted No of hours delivered in 15/16	BASE Funding 15/16 rates (PVI & Schools £3.75, MNS's £6.04)+ 16p due to deprivation underspend	16/17 base rate (based on)15/16 rate plus 1.5%	Total Base rate funding	Premises supplement	Inspection Outcome Grade @ 21st Jan 16	One off quality payment for 16/17 in advance of EYNFF in 17/18 (based on 2.5% increase on 16/17 base rate	Quality payment band	Quality Payment	Total Quality payment	% of children on Nov 15 census rated IDACI 4	Level 1 IDACI 4 Payment @ 25p	% of children on Nov 15 census rated IDACI 5	Level 2 IDACI 5 payment @ 70p	% of children on Nov 15 census rated IDACI 6	Level 3 IDACI 6 payment @ £1.00	Total IDACI payment (Level 1,2 & 3)	New indicative 2016/17 hourly rate based on final IDACI and Quality bandings	15/16 Hourly Rates as per Schools Forum Feb 2015	variance 16/17 vs 15/16
Childminders - all based on 51 weeks																					
EY482273		571	3.91	3.97	2,264.11		Not inspected	0.10	0.00	0.10	55.77	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.07		4.07
EY422700		571	3.91	3.97	2,264.11		Satisfactory	0.10	0.00	0.10	55.77	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.07		4.07
EY401621		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	0.00%	0.00	13.65%	0.10	0.00%	0.00	54.52	4.52		4.52
EY436837		571	3.91	3.97	2,264.11		Requires Improvement	0.10	0.00	0.10	55.77	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.07		4.07
EY477799		3,231	3.91	3.97	12,820.72		Not inspected	0.10	0.00	0.10	315.78	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.07		4.07
EY222539		571	3.91	3.97	2,264.11		Outstanding	0.10	0.54	0.64	363.84	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.61		4.61
EY362505		571	3.91	3.97	2,264.11		Outstanding	0.10	0.54	0.64	363.84	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.61		4.61
EY413244		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.43		4.43
EY372948		571	3.91	3.97	2,264.11		Outstanding	0.10	0.54	0.64	363.84	0.00%	0.00	13.65%	0.10	0.00%	0.00	54.52	4.70		4.70
EY221542		571	3.91	3.97	2,264.11		Outstanding	0.10	0.54	0.64	363.84	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.61		4.61
EY301543		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.43		4.43
EY402031		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	0.00%	0.00	13.65%	0.10	0.00%	0.00	54.52	4.52		4.52
EY299639		571	3.91	3.97	2,264.11		Outstanding	0.10	0.54	0.64	363.84	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.61		4.61
EY483147		571	3.91	3.97	2,264.11		Not inspected	0.10	0.00	0.10	55.77	17.11%	0.04	0.00%	0.00	0.00%	0.00	24.40	4.11		4.11
EY435414		571	3.91	3.97	2,264.11		Outstanding	0.10	0.54	0.64	363.84	28.66%	0.07	0.00%	0.00	0.00%	0.00	40.88	4.68		4.68
EY285296		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	28.66%	0.07	0.00%	0.00	0.00%	0.00	40.88	4.50		4.50
EY441811		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	15.44%	0.04	0.00%	0.00	0.00%	0.00	22.02	4.47		4.47
EY462702		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.43		4.43
EY304716		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.43		4.43
EY456897		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.43		4.43
EY440216		571	3.91	3.97	2,264.11		Good	0.10	0.36	0.46	261.15	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00	4.43		4.43
		14,641			58,103						5,333						292				
Sub Total		2,888,682			11,817,916						1,258,497						83,041				

Appendix B: Final indicative budget shares for 2016-17

	OFSTED URN	Setting Name (As registered with OFSTED)	Final Hourly rate as per schools forum report Feb 16	Summer Term predicted average No of children	Summer April Aug 16 predicted hours (65 days)	Total indicative payment for Summer period Apr 16-Aug 16	Autumn Term predicted average No of children	Autumn Sept 16 - Dec 16 predicted hrs (73 days)	Total indicative payment for Autumn Period Sept 16-Dec 16	Spring Term predicted average No of children	Spring Jan-Mar 17 Estimated Hours (58 days)	Total indicative paymentSpring Period Jan 17-Mar 17	TOTAL ESTIMATED HOURS (2016-17)	Total Indicative Annual Payment
		MAINTAINED NURSERY SCHOOLS												
	103030	Acacia Nursery	6.50	110	20,781	135,116.43	55	11,675	£75,908.24	71	11,975	£77,860.99	44,431	288,886
	103028	Church Hill Nursery and Childrens Centre	7.28	104	19,563	142,439.16	102	21,651	£157,644.43	103	17,372	£126,488.48	58,587	426,572
	103027	Low Hall Nursery School and Children's Centre	7.01	89	16,866	118,196.93	57	12,099	£84,791.73	69	11,638	£81,557.33	40,603	284,546
				303	57,210	395,753	214	45,425	318,344	243	40,985	285,907	143,620	1,000,004
		MAINTAINED NURSERY CLASSES												
	130343	Ainslie Wood Primary School	4.43	63	11,898	52,652.56	30	6,368	£28,180.67	30	5,060	£22,391.68	23,326	103,225
	131057	Barn Croft Primary School	4.07	30	5,619	22,849.10	24	5,094	£20,716.00	24	4,048	£16,460.43	14,761	60,026
	103080	Buxton School	4.44	77	14,580	64,666.21	58	12,312	£54,605.00	58	9,782	£43,387.80	36,674	162,659
	103052	Chapel End Infant School and Early Years Centre	4.42	113	21,344	94,327.17	96	20,378	£90,056.85	101	17,035	£75,283.91	58,757	259,668
	103032	Chase Lane Primary School	4.44	82	15,555	69,106.44	83	17,618	£78,272.85	83	13,999	£62,193.71	47,172	209,573
	103078	Coppermill Primary School	4.44	38	7,200	32,003.79	38	8,066	£35,853.96	38	6,409	£28,488.68	21,675	96,346
	103042	Davies Lane Primary School	4.61	115	21,663	99,909.07	100	21,227	£97,897.33	106	17,878	£82,454.05	60,768	280,260
	103073	Dawlish Primary School	4.43	32	6,090	26,956.78	25	5,307	£23,489.58	25	4,217	£18,664.25	15,613	69,111
	103044	Downsell Primary School	4.08	82	15,579	63,593.87	56	11,887	£48,523.06	56	9,445	£38,555.25	36,911	150,672
	103096	George Mitchell School	4.16	62	11,670	48,535.44	34	7,217	£30,015.92	34	5,735	£23,849.92	24,622	102,401
	103075	George Tomlinson Primary School	4.43	82	15,510	68,687.51	46	9,764	£43,242.26	47	7,927	£35,106.19	33,201	147,036
	103054	Greenleaf Primary School	4.64	75	14,166	65,752.16	78	16,557	£76,849.65	79	13,324	£61,845.72	44,407	204,448
	103074	Gwyn Jones Primary School	4.42	34	6,426	28,379.79	37	7,854	£34,686.03	37	6,241	£27,560.68	20,520	90,627
	103059	Handsworth Primary School	4.44	48	9,000	39,939.09	47	9,977	£44,272.91	47	7,927	£35,178.18	26,904	119,390
	103070	Henry Maynard Primary School	4.42	71	13,353	59,024.35	68	14,434	£63,803.69	68	11,469	£50,696.86	39,256	173,525
	133525	Mayville Primary School	4.47	59	11,160	49,859.33	46	9,764	£43,623.91	47	7,927	£35,416.03	28,851	128,899
	103077	Mission Grove Primary School	4.43	104	19,578	86,664.05	114	24,199	£107,117.41	119	20,071	£88,845.91	63,847	282,627
	103048	Newport School	4.59	97	18,360	84,265.15	86	18,255	£83,783.46	86	14,505	£66,572.30	51,120	234,621
	103069	Oakhill Primary School	4.61	36	6,840	31,547.87	35	7,429	£34,266.25	35	5,903	£27,227.13	20,173	93,041
	135193	Our Lady and St George's Catholic Primary School	4.11	36	6,759	27,786.54	28	5,944	£24,434.00	28	4,723	£19,414.66	17,425	71,635
	103081	Parkside Primary School	4.42	57	10,800	47,697.12	57	12,099	£53,435.24	57	9,614	£42,458.35	32,513	143,591
	135124	Selwyn Primary School	4.52	81	15,393	69,520.95	61	12,948	£58,479.92	71	11,975	£54,084.22	40,316	182,085
	103072	South Grove Primary School	4.42	76	14,364	63,437.17	58	12,312	£54,372.70	58	9,782	£43,203.23	36,458	161,013
	103090	St Joseph's Catholic Infant School	4.46	35	6,549	29,229.99	41	8,703	£38,843.83	41	6,915	£30,864.36	22,167	98,938
	EY473157	St Mary's Church of England Nursery	4.45	43	8,118	36,153.00	29	6,156	£27,414.34	29	4,891	£21,782.77	19,165	85,350
	103088	St Patrick's Catholic Primary School	4.51	38	7,128	32,126.07	34	7,217	£32,527.70	34	5,735	£25,845.72	20,080	90,500
	103089	St Saviour's Church of England Primary School	4.42	50	9,447	41,800.46	32	6,793	£30,055.34	32	5,397	£23,881.24	21,637	95,737
	103079	Stoneydown Park School	4.44	49	9,201	40,883.97	42	8,915	£39,614.29	42	7,084	£31,476.55	25,200	111,975
	103061	The Winns Primary School	4.55	91	14,400	65,572.63	54	9,552	£43,496.78	54	7,590	£34,561.49	31,542	143,631
	103060	Thorpe Hall Primary School	4.45	58	11,049	49,133.66	43	9,128	£40,589.08	43	7,253	£32,251.09	27,429	121,974
	103036	Whitehall Primary School	4.46	56	10,518	46,900.26	41	8,703	£38,807.03	41	6,915	£30,835.13	26,136	116,542
	103068	Woodford Green Primary School	4.44	26	4,947	21,960.36	18	3,821	£16,961.12	21	3,542	£15,723.05	12,310	54,645
				1,995	374,264	1,660,922	1,639	345,997	1,538,288	1,671	280,318	1,246,561	1,000,579	4,445,771
		ACADEMY NURSERY CLASSES												
	138690	Barclay Primary School	4.43	149	28,143	124,772.14	128	27,170	£120,459.69	129	21,758	£96,462.11	77,071	341,694

Appendix B: Final indicative budget shares for 2016-17

138325	Chingford Hall Primary School	4.66	47	8,907	41,465.34	36	7,642	£35,574.66	39	6,578	£30,622.33	23,127	107,662
EY483232	Hillyfield At The Park Nursery	4.07	85	16,020	65,143.73	108	22,925	£93,221.99	115	19,396	£78,872.89	58,341	237,239
138454	Hornbeam Academy Special Academy	4.51	4	747	3,370.44	11	2,335	£10,535.22	11	1,855	£8,371.03	4,937	22,277
140197	Joseph Clarke School	4.42	0	0	0.00	1	212	£937.46	1	169	£744.88	381	1,682
141734	Larkswood Primary School	4.42	88	16,563	73,148.83	61	12,948	£57,185.08	67	11,300	£49,907.18	40,812	180,241
142461	Longshaw Primary School	4.07	64	12,060	49,040.78	50	10,613	£43,158.33	50	8,433	£34,292.56	31,107	126,492
139723	Riverley Primary School	4.11	50	9,500	39,083.18	46	9,764	£40,170.63	47	7,927	£32,612.49	27,191	111,866
136362	Roger Ascham Primary School	4.61	56	10,668	49,149.78	54	11,462	£52,810.09	54	9,108	£41,961.61	31,238	143,921
139724	Sybourn Primary School	4.43	119	22,406	99,187.25	82	17,406	£77,053.06	87	14,674	£64,957.70	54,486	241,198
139016	The Woodside Primary Academy	4.08	115	21,755	88,827.12	102	21,651	£88,403.85	103	17,372	£70,932.21	60,779	248,163
140405	Thomas Gamuel Primary School	4.08	58	10,905	44,451.00	57	12,099	£49,319.12	57	9,614	£39,187.77	32,618	132,958
140795	Whitefield Schools and Centre	4.64	8	1,494	6,929.89	24	5,094	£23,630.44	24	4,048	£18,776.17	10,636	49,337
139317	Whittingham Primary Academy	4.51	56	10,584	47,769.31	86	18,255	£82,391.44	86	14,505	£65,466.24	43,344	195,627
138364	Willow Brook Primary School Academy	4.12	71	13,356	54,964.12	55	11,675	£48,045.21	55	9,276	£38,175.56	34,307	141,185
136364	Yardley Primary School	4.59	59	11,109	50,977.55	114	24,199	£111,043.55	114	19,228	£88,232.51	54,535	250,254
			1,028	194,217	838,280	1,015	215,452	933,940	1,039	175,241	759,575	584,910	2,531,796
	Term Time (38 weeks provider)												
155086	All Saints Pre-School	4.64	22	4,248	19,723.75	21	4,458	£20,697.06	26	4,385	£20,360.95	13,091	60,782
	Azhar Academy	4.62	24	4,617	21,345.66	36	7,642	£35,329.44	37	6,241	£28,851.69	18,499	85,527
146918	Busy Bee Pre-School	4.65	37	6,963	32,387.70	13	2,759	£12,835.46	22	3,711	£17,259.42	13,433	62,483
156206	Buxton Bears Pre-School	4.58	51	9,561	43,754.96	48	10,189	£46,628.32	48	8,096	£37,049.73	27,846	127,433
EY468586	Calvary Pre-School	4.65	25	4,722	21,978.67	23	4,882	£22,724.15	25	4,217	£19,626.15	13,821	64,329
EY305812	Chingford House School	4.63	43	8,128	37,648.53	35	7,429	£34,412.56	35	5,903	£27,343.38	21,461	99,404
155087	Chingford Mount Baptist Church Pre-School Playgroup	4.60	19	3,621	16,653.44	13	2,759	£12,691.22	14	2,361	£10,859.84	8,742	40,204
EY448373	Early Education Centre	4.60	55	10,404	47,887.42	41	8,703	£40,058.02	48	8,096	£37,263.37	27,203	125,209
EY480845	Early Education Centre	4.29	27	5,025	21,547.90	29	6,156	£26,396.81	35	5,903	£25,313.76	17,084	73,258
EY458612	Early Education Centre	4.58	47	8,916	40,803.18	22	4,670	£21,371.31	31	5,229	£23,927.95	18,814	86,102
EY468617	Early Learners Centre Pre School	4.58	50	9,375	42,937.50	40	8,491	£38,887.50	48	8,096	£37,078.87	25,962	118,904
146924	Emmanuel Community Church Nursery	4.58	25	4,737	21,678.41	14	2,972	£13,599.93	15	2,530	£11,578.04	10,239	46,856
153676	Grange Park Pre-school	4.59	37	6,965	31,983.45	20	4,245	£19,494.80	20	3,373	£15,490.09	14,584	66,968
EY300790	Handsworth Pre-school	4.62	26	4,944	22,857.47	20	4,245	£19,627.47	22	3,711	£17,155.06	12,900	59,640
EY462769	Leytonstone Community Pre-School	4.58	28	5,238	23,971.18	25	5,307	£24,285.58	26	4,385	£20,068.60	14,930	68,325
EY450601	Morning Glory Pre-School	4.22	12	2,190	9,233.92	11	2,335	£9,845.07	13	2,193	£9,244.96	6,718	28,324
EY471015	Noahs Ark Community Preschool	4.58	5	948	4,338.43	1	212	£971.42	1	169	£771.87	1,329	6,082
EY474312	Noor Ul Islam Pre-School	4.79	74	13,917	66,685.48	80	16,981	£81,369.23	80	13,493	£64,654.01	44,391	212,709
EY384680	Normanhurst School Nursery	4.59	41	6,804	31,225.06	39	7,210	£33,088.85	39	6,164	£28,287.55	20,178	92,601
146927	Parkside Pre-School	4.76	19	3,504	16,666.43	7	1,486	£7,067.42	15	2,530	£12,033.43	7,520	35,767
EY495048	Redwood Preschool	4.62	79	14,839	68,568.71	61	12,948	£59,832.30	70	11,806	£54,555.58	39,594	182,957
EY456843	Rising Stars Pre School Ltd	4.62	28	5,381	24,863.01	20	4,245	£19,615.76	21	3,542	£16,365.52	13,168	60,844
153685	Shernhall Pre-School	4.59	67	12,612	57,927.76	37	7,854	£36,073.56	44	7,421	£34,085.94	27,887	128,087
EY393373	Snowdrops Day Nursery	4.59	38	7,116	32,656.89	42	8,915	£40,914.08	45	7,590	£34,831.43	23,621	108,402
EY451801	St Andrews Pre-School Higham Hill	4.63	22	4,130	19,118.50	23	4,882	£22,600.41	26	4,385	£20,300.05	13,397	62,019
EY415295	St Annes Pre School	4.58	24	4,504	20,612.11	17	3,609	£16,514.20	20	3,373	£15,437.39	11,486	52,564
EY424194	St Francis Pre-School	4.58	18	3,394	15,532.30	15	3,184	£14,571.35	16	2,699	£12,349.91	9,277	42,454
EY467776	St Patrick's Pre-School	4.28	42	7,980	34,131.37	32	6,793	£29,052.62	32	5,397	£23,084.51	20,170	86,269
155085	The Cornerstone Pre-School	4.77	45	8,536	40,758.70	32	6,793	£32,434.00	33	5,566	£26,576.62	20,894	99,769
146925	The Village Playgroup	4.58	20	3,807	17,422.35	17	3,609	£16,514.20	25	4,217	£19,296.73	11,632	53,233
405124	Walthamstow Montessori School	4.59	74	13,962	64,124.38	64	13,585	£62,393.61	64	10,794	£49,576.44	38,342	176,094
			1,122	211,088	971,025	898	189,548	871,898	996	167,574	770,679	568,211	2,613,601

Appendix B: Final indicative budget shares for 2016-17

		Full Year 51 weeks provider												
EY282548	Alert Kids Day Nursery	4.59	57	13,457	61,794.88	39	7,410	£34,026.91	46	6,555	£30,100.72	27,422	125,923	
EY376104	Alpha Steps Nursery	4.64	30	7,038	32,630.98	28	5,320	£24,665.65	33	4,703	£21,802.67	17,061	79,099	
EY280017	Billets Corner Day Nursery	4.58	17	3,925	17,962.37	13	2,470	£11,303.71	20	2,850	£13,042.74	9,245	42,309	
EY469239	Bright Futures Nursery Highams Green	4.60	18	4,214	19,380.72	15	2,850	£13,107.51	21	2,993	£13,762.89	10,057	46,251	
159439	Bright Kids Day Nursery	4.61	28	6,662	30,683.92	20	3,800	£17,502.08	21	2,993	£13,782.89	13,455	61,969	
EY289831	Busy Bees Day Nursery at Chingford	4.58	49	11,628	53,290.88	43	8,170	£37,442.94	44	6,270	£28,735.28	26,068	119,469	
155098	Busy Bees Day Nursery at Leytonstone	4.58	49	11,566	52,930.64	1	190	£869.52	1	143	£652.14	11,899	54,452	
146917	Carville Day Nursery	4.58	22	5,295	24,232.04	17	3,230	£14,781.77	17	2,423	£11,086.33	10,948	50,100	
EY481682	Charis Day Nursery	4.32	2	579	2,499.20	7	1,330	£5,740.81	9	1,283	£5,535.78	3,192	13,776	
EY283963	Climbers Kids' Club	4.23	28	6,708	28,388.42	18	3,420	£14,473.53	18	2,565	£10,855.14	12,693	53,717	
EY481313	Divine Foot Prints Nursery & Pre-School	4.29	2	490	2,101.04	7	1,330	£5,702.81	7	998	£4,277.11	2,818	12,081	
EY458063	Docklands Day Nursery	4.58	20	4,722	21,609.76	25	4,750	£21,737.90	28	3,990	£18,259.84	13,462	61,607	
EY314097	Excel Day Nursery	4.60	20	4,728	21,768.55	12	2,280	£10,497.53	13	1,853	£8,529.24	8,861	40,795	
EY477461	Footsteps Day Nursery	4.62	17	4,012	18,527.68	13	2,470	£11,406.62	14	1,995	£9,213.04	8,477	39,147	
EY348487	Higham Hill Daycare	4.70	55	13,115	61,605.98	34	6,460	£30,345.00	37	5,273	£24,766.87	24,848	116,718	
EY491047	Highams Park Day Nursery & Preschool	4.58	40	9,400	43,018.16	44	8,360	£38,258.70	44	6,270	£28,694.03	24,030	109,971	
155097	Just Learning Nursery	4.67	38	9,065	42,351.43		0	£0.00		0	£0.00	9,065	42,351	
EY456837	Kids Inc Day Nursery	4.59	36	8,468	38,904.17	18	3,420	£15,712.36	18	2,565	£11,784.27	14,453	66,401	
EY397311	Kids R Us	4.58	24	5,658	25,893.27	21	3,990	£18,259.84	21	2,993	£13,694.88	12,641	57,848	
EY425660	Kidsaloud Daycare Nursery Ltd	4.59	35	8,260	37,948.56	19	3,610	£16,585.27	23	3,278	£15,057.68	15,148	69,592	
146921	Little Cherubs Day Nursery	4.22	16	3,830	16,148.81	10	1,900	£8,011.16	10	1,425	£6,008.37	7,155	30,168	
EY440955	Little Diamonds	4.65	20	4,784	22,235.21	22	4,180	£19,427.92	23	3,278	£15,233.26	12,242	56,896	
156214	Little Green Man Nursery	4.60	63	14,969	68,903.30	53	10,070	£46,352.88	58	8,265	£38,044.35	33,304	153,301	
EY468365	Little Miracles Day Nursery	4.58	31	7,352	33,645.69	26	4,940	£22,607.42	28	3,990	£18,259.84	16,282	74,513	
156213	Magic Roundabout Nurseries Limited	4.58	2	490	2,242.44	3	570	£2,608.55	3	428	£1,956.41	1,488	6,807	
EY481367	Mulberry Day Nursery Limited	4.58	6	1,489	6,814.26	7	1,330	£6,086.61	7	998	£4,564.96	3,817	17,466	
EY471908	Nappy Gang Nursery	4.58	25	5,900	27,000.76	21	3,990	£18,259.84	22	3,135	£14,347.01	13,025	59,608	
153682	Penrhyn Childcare Centre	4.64	36	8,495	39,417.11	28	5,320	£24,684.99	28	3,990	£18,513.75	17,805	82,616	
155074	Pippi Longstocking Nursery	4.22	10	2,438	10,279.58	5	950	£4,005.58	6	855	£3,605.02	4,243	17,890	
EY440478	Precious Tots	4.34	14	3,438	14,925.73	4	760	£3,299.46	4	570	£2,474.60	4,768	20,700	
153687	Smilers Day Nursery	4.61	39	9,149	42,196.23	37	7,030	£32,423.16	41	5,843	£26,946.28	22,022	101,566	
155051	Snowberry Nursery	5.65	31	7,471	42,184.25	31	5,890	£33,257.30	44	6,270	£35,402.93	19,631	110,844	
EY482580	Stepping Stones Childcare	4.58	3	675	3,089.07	8	1,520	£6,956.13	8	1,140	£5,217.10	3,335	15,262	
EY469900	Sugar Plum Tree Nursery	4.59	26	6,097	28,003.93	23	4,370	£20,071.70	27	3,848	£17,671.82	14,315	65,747	
EY453185	Sunbeams Day Nursery	4.78	40	9,587	45,827.87	26	4,940	£23,614.24	26	3,705	£17,710.68	18,232	87,153	
EY453184	Sunshine Day Nursery	4.76	37	8,807	41,889.61	28	5,320	£25,304.05	29	4,133	£19,655.82	18,260	86,849	
EY283352	The Lloyd Park Centre	4.77	79	18,729	89,262.70	62	11,780	£56,143.66	64	9,120	£43,466.06	39,629	188,872	
EY338863	Tiny Toes Daycare Nursery	4.64	26	6,167	28,592.68	26	4,940	£22,903.82	28	3,990	£18,499.24	15,097	69,996	
155080	Tiny Tots Day Nursery	4.58	19	4,412	20,191.08	16	3,040	£13,912.26	17	2,423	£11,086.33	9,875	45,190	
EY340450	Tom Thumb Day Nursery	4.58	16	3,817	17,468.12	16	3,040	£13,912.26	16	2,280	£10,434.19	9,137	41,815	
155088	Twinkles Day Nursery	4.73	10	2,483	11,735.65	7	1,330	£6,286.11	7	998	£4,714.58	4,811	22,736	
EY227193	Waltham Forest Asian Mothers Group	4.58	3	616	2,819.06	4	760	£3,478.06	6	855	£3,912.82	2,231	10,210	
EY469963	Walthamstow Village Montessori Nursery	4.58	5	1,184	5,418.46	7	1,330	£6,086.61	7	998	£4,564.96	3,512	16,070	
EY462880	Yardley Forest Nursery	4.58	26	6,245	28,579.62	0	0	£0.00	3	428	£1,956.41	6,673	30,536	
			1,169	277,614	1,286,394	864	164,160	762,114	947	134,948	627,880	576,722	2,676,388	

Appendix B: Final indicative budget shares for 2016-17

		Childminders - all based on 51 weeks												
EY482273	Akhood, Fatima	4.07	1	238	967.80	1	190	£772.62	1	143	£579.46	571	2,320	
EY422700	Buenaventura, Andrea	4.07	1	238	967.80	1	190	£772.62	1	143	£579.46	571	2,320	
EY401621	Cowan, Juliet Louvain	4.52	1	238	1,076.23	1	190	£859.17	1	143	£644.38	571	2,580	
EY436837	Deleva, Elena	4.07	1	238	967.80	1	190	£772.62	1	143	£579.46	571	2,320	
EY477799	Dunca, Anuta	4.07	1	238	967.80	9	1,710	£6,953.54	9	1,283	£5,215.16	3,231	13,137	
EY222539	Durrant Janine Kay	4.61	1	238	1,096.32	1	190	£875.22	1	143	£656.41	571	2,628	
EY362505	Elliot, Carol Linda	4.61	1	238	1,096.32	1	190	£875.22	1	143	£656.41	571	2,628	
EY413234	Flood, Nicola Jane	4.43	1	238	1,053.48	1	190	£841.02	1	143	£630.76	571	2,525	
EY379948	Haque, Syeda	4.70	1	238	1,119.07	1	190	£893.37	1	143	£670.03	571	2,682	
EY221542	Harvey, Helen	4.61	1	238	1,096.32	1	190	£875.22	1	143	£656.41	571	2,628	
EY301543	Hristova, Cvetelina	4.43	1	238	1,053.48	1	190	£841.02	1	143	£630.76	571	2,525	
EY402031	Luknar, Dagmar	4.52	1	238	1,076.23	1	190	£859.17	1	143	£644.38	571	2,580	
EY299639	Magen, Belynda	4.61	1	238	1,096.32	1	190	£875.22	1	143	£656.41	571	2,628	
EY483147	Maloney, Melissa	4.11	1	238	977.98	1	190	£780.74	1	143	£585.56	571	2,344	
EY435414	Odogwu, Christine	4.68	1	238	1,113.38	1	190	£888.83	1	143	£666.62	571	2,669	
EY286296	O'Hara, Kevin	4.50	1	238	1,070.54	1	190	£854.63	1	143	£640.97	571	2,566	
EY441811	Rahim, Fouzia	4.47	1	238	1,062.67	1	190	£848.35	1	143	£636.26	571	2,547	
EY462702	Richmond, Diamandou	4.43	1	238	1,053.48	1	190	£841.02	1	143	£630.76	571	2,525	
EY304716	Staub, Bibi Sahenaz	4.43	1	238	1,053.48	1	190	£841.02	1	143	£630.76	571	2,525	
EY456897	Sweeney, Andrea Sousa Oliveira	4.43	1	238	1,053.48	1	190	£841.02	1	143	£630.76	571	2,525	
EY440216	Trowers, Bernice Angeline	4.43	1	238	1,053.48	1	190	£841.02	1	143	£630.76	571	2,525	
			21	4,998	22,073	29	5,510	23,803	29	4,133	17,852	14,641	63,728	
				5,637	1,119,391	5,174,447	4,659	966,093	4,448,387	4,925	803,198	3,708,454	2,888,682	13,331,288
		1% contingency fund for any increase in delivery hours due to census anomalies and in year increases in quality payment	4.43										28,887	127,969
													2,917,569	13,459,256

Team around the Setting (TAS) Universal support

EYDSG Topslice		No of FTE posts	FTE salary	total annual charge
EY service manager		1	80,000	80,000
Education Business Consultant- PVI	Strategic	0.6	50,000	30,000
Education Business Consultant-Schools	Strategic	0.6	50,000	30,000
Education Business Support	2 x 1 day visits to 150 settings @£300 per visit (0.5 day visit, 0.5 day write up)	1	90,000	90,000
2 x FEEE Finance Officers		2	35,000	70,000
2 x participation officers		2	35,000	70,000
1 x training officer		1	43,000	43,000
Training Costs				20,035
0.5 CYPD officer		0.5	43,000	21,500
0.5 Hub Officer		0.5	43,000	21,500
Project Manager		0.5	49,000	24,500
Project support/admin officer		1	30,000	30,000
Early Years Consultant PVI	Strategic	0.6	50,000	30,000
Early Years Consultants Schools	Strategic	0.6	50,000	30,000
Early Years L&D and T&L	2 x 1 day visits to 150 settings @£300 per visit (0.5 day visit, 0.5 day write up)	1	90,000	90,000
Moderation & Phonics check				9,000
EY safeguarding post (PVI)		1	50,000	50,000
SalT Contract	2 x 0.5 day visits to 150 settings @ £300 per day plus group & on online training resources			130,000
servicing schools forum				4,100
non statutory assessments to apply for EY SEN top up funding & QA/Moderation of on intake, 2 years olds and transition assessments	150 settings PVI and Maintained			150,000
SEN top up fees				250,000
Subtotal				1,273,635
10% management/overheads				127,364
Total				1,400,999
EYDSG allocation 2016/17 (same as agreed for 15/16)				1,057,000
Allocation needed from EY underspend for 16/17	see EY underspend budget on table below			343,999

EY transfer to HNB for IDS staffing costs					
EY Area SENCO's (PVI settings)& Home visiting PVI's	Provided to PVI's because a significant number of SENCO's are not qualified teachers or EYP's.				260,000
EY HNB contribution to key working for 0-4's					240,000
					500,000

EY Underspend- cost centre 1877	15/16	16/17	17/18	18/19	Total
Childminder Business Support Officer 16/17		22,500			22,500
Childminding Dev Workers (CMDW's) 16/17	100,000	100,000			200,000
SalT in CC's Public Health Contract		172,000	172,000	172,000	516,000
Workforce Development Commissioned Service		100,000			100,000
Premises & Place development	90,000	90,000			180,000
Request to DfE to convert Rev to Capital Funding		488,167	488,167	488,167	1,464,501
4% EYSFF hourly rate top up 16/17 & 1 % contingency		674,000			674,000
Children's Centres (Family Support)	200,000	200,000			400,000
Additional allocation for EY centrally retained support 16/17 (see above)		343,999			343,999
2YO marketing costs	20,000	20,000	20,000	20,000	80,000
2YO assessment/moderation lead x 1 FTE	23,000	42,000			65,000
Digital by Default- training & 2YO videos	34,000				34,000
Stay2Play Pilot	70,000	100,000			170,000
Childcare Participation Officer x 2 FTE	79,000				79,000
3YO FEEE payments iro 14/15 made in 15/16	540,000				540,000
15/16 2YO FEEE top up of DfE rate based on 900 children attending all year @ 0.72p per hour & 16/17 2YO FEEE top up of DfE rate based on 1200 children attending all year @ 0.72p per hour	370,000	500,000			870,000
Total	1,526,000	2,852,666	680,167	680,167	5,739,000

School Forum underspend 14/15 reported in Sept 15 **5,739,000**

Appendix D: Premises rates analysis

OFSTED URN	Setting Name (As registered with OFSTED)	Total No of children	Business rates	Other Premises Costs (mortgage/ Lease/Rent all)	Total Premises Costs per annum	No of operational week per year	Number of operational hours per week	total deliverable hours	premises cost per hour
	Term Time (38 weeks provider)								
153676	Grange Park Pre-school	28	0.00	1,092.50	1,092.50	38	30	31,920	0.03
146924	Emmanuel Community Church Nursery	28	0.00	2,090.00	2,090.00	38	30	31,920	0.07
EY462769	Leytonstone Community Pre-School	48	0.00	4,000.00	4,000.00	38	30	54,720	0.07
EY480845	Early Education Centre	60	0.00	6,000.00	6,000.00	38	30	68,400	0.09
EY471015	Noahs Ark Community Preschool	60	0.00	6,000.00	6,000.00	38	30	68,400	0.09
153685	Shernhall Pre-School	55	0.00	5,940.00	5,940.00	38	30	62,700	0.09
EY384680	Normanhurst School Nursery	249	17,255.00	20,000.00	37,255.00	38	30	283,860	0.13
EY393373	Snowdrops Day Nursery	40	0.00	6,000.00	6,000.00	38	30	45,600	0.13
EY468617	The Early Learners Centre Pre-School	40	0.00	6,000.00	6,000.00	38	30	45,600	0.13
146925	The Village Playgroup	40	0.00	6,000.00	6,000.00	38	30	45,600	0.13
EY448373	Early Education Centre	36	0.00	6,000.00	6,000.00	38	30	41,040	0.15
146927	Parkside Pre-School	35	0.00	6,000.00	6,000.00	38	30	39,900	0.15
EY456843	Rising Stars Pre School Ltd	35	0.00	6,000.00	6,000.00	38	30	39,900	0.15
156206	Buxton Bears Pre-School	32	0.00	6,000.00	6,000.00	38	30	36,480	0.16
EY467776	St Patrick's Pre-School	32	0.00	6,000.00	6,000.00	38	30	36,480	0.16
EY451801	St Andrews Pre-School Higham Hill	30	0.00	6,000.00	6,000.00	38	30	34,200	0.18
EY300790	Handsworth Pre-school	28	0.00	6,000.00	6,000.00	38	30	31,920	0.19
EY415295	St Annes Pre School	27	0.00	6,000.00	6,000.00	38	30	30,780	0.19
EY424194	St Francis Pre-School	26	0.00	6,000.00	6,000.00	38	30	29,640	0.20
155086	All Saints Pre-School	34	0.00	7,980.00	7,980.00	38	30	38,760	0.21
146918	Busy Bee Pre-School	40	359.89	10,260.00	10,619.89	38	30	45,600	0.23
155085	The Cornerstone Pre-School	40	0.00	11,500.00	11,500.00	38	30	45,600	0.25
EY468586	Calvary Pre-School	60	1,527.02	20,000.00	21,527.02	38	30	68,400	0.31
EY495048	Redwood Preschool	56	3,845.40	20,000.00	23,845.40	38	30	63,840	0.37
EY474312	Noor Ul Islam Pre-School	80	0.00	34,999.92	34,999.92	38	30	91,200	0.38
EY450601	Morning Glory Pre-School	26	0.00	12,000.00	12,000.00	38	30	29,640	0.40
EY458612	Early Education Centre	44	11,520.00	9,000.00	20,520.00	38	30	50,160	0.41
EY305812	Chingford House School	55	7,132.32	20,000.00	27,132.32	38	30	62,700	0.43
405124	Walthamstow Montessori School	128	0.00	20,000.00	20,000.00	38	30	145,920	0.14

Appendix D: Premises rates analysis

OFSTED URN	Setting Name (As registered with OFSTED)	Total No of children	Business rates	Other Premises Costs (mortgage/ Lease/Rent all)	Total Premises Costs per annum	No of operational week per year	Number of operational hours per week	total deliverable hours	premises cost per hour
	Full Year 51 weeks provider				0.00				
EY283352	The Lloyd Park Centre	113	4,930.00	6,424.00	11,354.00	51	50	288,150	0.04
155098	Busy Bees Day Nursery at Leytonstone	100	0.00	20,000.00	20,000.00	51	50	255,000	0.08
153682	Penrhyn Childcare Centre	36	1,996.65	7,000.00	8,996.65	51	50	91,800	0.10
EY348487	Higham Hill Daycare	88	6,566.40	20,000.00	26,566.40	51	50	224,400	0.12
EY453184	Sunshine Day Nursery	83	9,120.00	20,600.00	29,720.00	51	50	211,650	0.14
EY469963	Walthamstow Village Montessori Nursery	100	19,103.75	20,000.00	39,103.75	51	50	255,000	0.15
EY397311	Kids R Us	50	0.00	20,000.00	20,000.00	51	50	127,500	0.16
EY283963	Climbers Kids' Club	66	7,164.13	20,000.00	27,164.13	51	50	168,300	0.16
EY481682	Charis Day Nursery	48	0.00	20,000.00	20,000.00	51	50	122,400	0.16
EY494126	Footsteps Day Nursery	48		20,000.00	20,000.00	51	50	122,400	0.16
EY458063	Docklands Day Nursery	40	3,780.95	13,500.00	17,280.95	51	50	102,000	0.17
156213	Magic Roundabout Nurseries Limited	115	21,322.25	30,000.00	51,322.25	51	50	293,250	0.18
EY376104	Alpha Steps Nursery	50	2,489.65	20,000.00	22,489.65	51	50	127,500	0.18
156214	Little Green Man Nursery	78	16,638.75	20,000.00	36,638.75	51	50	198,900	0.18
EY471908	Nappy Gang Nursery	66	11,880.00	20,000.00	31,880.00	51	50	168,300	0.19
EY425660	Kidsaloud Daycare Nursery Ltd	52	5,520.00	20,000.00	25,520.00	51	50	132,600	0.19
EY440955	Little Diamonds	65	12,818.00	20,000.00	32,818.00	51	50	164,475	0.20
EY456837	Kids Inc Day Nursery	73	18,487.50	20,000.00	38,487.50	51	50	186,150	0.21
EY340450	Tom Thumb Day Nursery	44	3,200.00	20,000.00	23,200.00	51	50	112,200	0.21
EY289831	Busy Bees Day Nursery at Chingford	120	43,861.50	20,000.00	63,861.50	51	50	306,000	0.21
EY282548	Alert Kids Day Nursery	76	22,185.00	20,000.00	42,185.00	51	50	193,800	0.22
EY481313	Divine Foot Prints Nursery & Pre-School	26	0.00	15,600.00	15,600.00	51	50	66,300	0.24
EY468365	Little Miracles Day Nursery	50	10,560.00	20,000.00	30,560.00	51	50	127,500	0.24
159439	Bright Kids Day Nursery	50	10,680.00	19,992.00	30,672.00	51	50	127,500	0.24
EY462880	Yardley Forest Nursery	54	14,615.25	20,000.00	34,615.25	51	50	137,700	0.25
EY453185	Sunbeams Day Nursery	62	13,434.25	26,400.00	39,834.25	51	50	158,100	0.25
155080	Tiny Tots Day Nursery	40	6,120.00	20,000.00	26,120.00	51	50	102,000	0.26
EY469900	Sugar Plum Tree Nursery	30	260.00	20,000.00	20,260.00	51	50	76,500	0.26
146921	Little Cherubs Day Nursery	41	8,040.00	20,000.00	28,040.00	51	50	104,550	0.27
EY338863	Tiny Toes Daycare Nursery	45	7,800.00	24,000.00	31,800.00	51	50	114,750	0.28
EY477461	Footsteps Day Nursery	35	5,400.00	20,000.00	25,400.00	51	50	89,250	0.28

Appendix D: Premises rates analysis

OFSTED URN	Setting Name (As registered with OFSTED)	Total No of children	Business rates	Other Premises Costs (mortgage/Lease/Rent all)	Total Premises Costs per annum	No of operational week per year	Number of operational hours per week	total deliverable hours	premises cost per hour
EY469239	Bright Futures Nursery Highams Green	36	6,960.00	20,000.00	26,960.00	51	50	91,800	0.29
155051	Snowberry Nursery	57	22,801.25	20,000.00	42,801.25	51	50	145,350	0.29
EY440478	Precious Tots	26		20,000.00	20,000.00	51	50	66,300	0.30
EY482580	Stepping Stones Childcare	26	0.00	20,000.00	20,000.00	51	50	66,300	0.30
153687	Smilers Day Nursery	35	7,200.00	20,000.00	27,200.00	51	50	89,250	0.30
146917	Carville Day Nursery	35	7,560.00	20,000.00	27,560.00	51	50	89,250	0.31
EY314097	Excel Day Nursery	30	5,760.00	20,000.00	25,760.00	51	50	76,500	0.34
155074	Pippi Longstocking Nursery	22	759.26	20,000.00	20,759.26	51	50	56,100	0.37
EY481367	Mulberry Day Nursery Limited	22		22,356.00	22,356.00	51	50	56,100	0.40
155088	Twinkles Day Nursery	20	900.00	20,000.00	20,900.00	51	50	51,000	0.41
EY227193	Waltham Forest Asian Mothers Group	15	0.00	20,000.00	20,000.00	51	50	38,250	0.52

Appendix E – Feedback from final consultation

1. The consultation asked the following questions:
 - 1.1 Despite the fact the Local Authority receives £5.28 per hour to fund the provision of 2 year old FEEE places from the Education Funding Agency (EFA) we propose that the rate paid by the Local Authority to providers remains unchanged for 2016-17 at £6.00 per hour, and that the shortfall is subsidised by the LA from an underspend in 2 trajectory funding received. Do you agree?
 - 1.2 The Local Authority recommends that the existing 2015-16 EYSFF funding rates for deprivation remain unchanged for 2016-17. Do you agree?
 - 1.3 The Local Authority recommends that a tiered 'Premises supplement' be paid to providers in respect of premises costs, based on evidence being provided of costs incurred, as detailed below: Base Funding Low - 5p per hour Medium - 10p per hour, High - 15p per hour. The high band payment rate is equivalent to the premises rate paid to all providers in 2015-16. Do you agree?
 - 1.4 Of the 54 respondents to the initial Early Years consultation in November 2015 35% agreed that the quality supplement for 2016-17 should remain the same as 2015-16. 26% felt that an additional rate should be applied to those settings that receive a Good grade overall with Outstanding areas. Further work has been carried out by the LA following the consultation to establish the feasibility of adding an additional quality payment rate grade which would be payable to those settings that receive a Good Ofsted grade overall with Outstanding areas. This feasibility exercise has established that:
 - The most recent Ofsted inspections for Schools and PVI sector settings were carried out between 2010 and 2016. During this period there have been several changes to the Ofsted inspection framework across Schools and Early Years during this period, including the areas on which judgements are made.
 - It would be impossible to apply this payment criteria consistently and fairly. The Local Authority is therefore recommending that the existing 2015-16 EYSFF Quality funding rates remain unchanged for 2016-17. Do you agree?
2. The consultation allowed respondents an opportunity to provide any other comments should they want to.
3. There were 43 respondents to the final consultation. This represented 41 different Early Years providers, with two settings completing the survey with two members of staff of different roles. All respondents completed the survey in full.
4. There was a broad mix of settings that responded (two respondents did not state what type of setting they came from – 5%):
 - 28% from schools;

- 37% from PVI settings delivering childcare all year round (including childminders); and
 - 30% from PVI settings delivering childcare term-time only.
5. Over half of respondents were head teachers or PVI childcare managers (53%). The remainder included Bursars/Finance Officers (9%), Private Business Owners (9%) and others (28%).
 6. There was widespread agreement with all of the consultation questions (see below). The agreement rate was over 90% in all but one of the consultation questions. This was where the agreement rate was 79% when asked about whether there should be a tiered 'Premises supplement' paid to providers in respect of premises costs, based on evidence being provided of costs incurred.

Type of EY setting	Number	% (of 43 respondents)
Charity - Full Daycare	6	14%
Private - Full Daycare	7	16%
Childminder	3	7%
Charity - Preschool	11	26%
Private - Preschool	1	2%
Independent School	1	2%
Maintained Nursery School	2	5%
Maintained Primary	4	9%
Primary Academy	4	9%
All Through School	2	5%
Not stated	2	5%
Grand Total	43	100%

Job role	Number	% (of 43 respondents)
PVI Childcare Manager	14	33%
Headteacher	9	21%
Other	8	19%
Bursar/Finance Officer	4	9%
Private Business Owner	4	9%
Charity Trustee	2	5%
School Governor	1	2%
Not stated	1	2%
Grand Total	43	100%

Q3. Funding rate for 2 year old children. Whether the rate paid by the Local Authority to providers should remain unchanged for 2016-17 at £6.00 per hour.	Number	% (of 43 respondents)
Yes	43	100%
No	0	0%
Grand Total	43	100%

Q5. Deprivation. Whether the existing 2015-16 EYSFF funding rates for deprivation should remain unchanged for 2016-17.	Number	% (of 43 respondents)
Yes	39	91%
No	4	9%
Grand Total	43	100%

Q6. Whether there should be a tiered 'Premises supplement' paid to providers in respect of premises costs, based on evidence being provided of costs incurred.	Number	% (of 43 respondents)
Yes	34	79%
No	9	21%
Grand Total	43	100%

Q7. Whether the existing 2015-16 EYSFF Quality funding rates should remain unchanged for 2016-17.	Number	% (of 43 respondents)
Yes	39	91%
No	4	9%
Grand Total	43	100%

LONDON BOROUGH OF WALTHAM FOREST

Meeting / Date	SCHOOLS FORUM 10 February 2016	Agenda Item	6
Report Title	Growth Fund for 2016-17 and amendments to Growth Fund Criteria		
Decision/ Discussion/ Information	For Information and decision		
Report Author/ Contact details	Rishi Peetamsingh: Group Accountant-Schools 0208 496 6304 rishi.peetamsingh@walthamforest.gov.uk Duncan Pike: Strategic Finance Advisor 0208 496 3502 duncan.pike@walthamforest.gov.uk		
Appendices	Appendix A – Existing Criteria Appendix B – Proposed Criteria Appendix C - Final allocation of Growth Fund for 2016-17		

1. SUMMARY

- 1.1 In June 2015, Schools Forum agreed to set up a Task and Finish Group of school and academy members to review the rates applied to the local formula factors allowed by regulation and the operation and size of the Growth Fund.
- 1.2 Schools Forum decides on the size and allocation the Growth Fund.
- 1.3 In September 2015, Schools Forum agreed to amend the criteria covering Leadership and Management support and class size protection for bulge classes. This is to ensure affordability and fairness.
- 1.4 It is further proposed to set an initial cap on the support that can be given from the Growth Fund for good and outstanding schools with falling rolls at **£100,000**, subject to further discussion at Schools Block Review Group.
- 1.5 In addition some amendments have made to the criteria text that clarifies the methodology for providing for permanent expansions and bulge classes planned by the LA from the Growth Fund.

2. RECOMMENDATIONS

2.1 For the reasons given in this report Schools Forum is recommended to agree:

2.1.1 The Final Growth Fund Allocation for 2016-17 as set out in Appendix C.

2.1.2 The existing Growth Fund criteria are retained, but with the following amendments:

- A new cap on the support for 'Good and Outstanding Schools with falling rolls' be set at **£100,000**.
- Changes to the wording on methodology of providing support for schools that are permanently expanding.
- Changes to the wording on permanent expansions and bulge classes to clarify that these apply where the LA has planned them.

Schools members, academies members and PVI representatives may vote on Recommendations 2.1.1 to 2.1.2

3. REASON

3.1 The Local Authority is required to consult with the Schools Forum regarding any changes to Growth Fund as this affects the total funding available to be delegated to all schools through the Local Funding Formula for 5 to 16 year olds. Schools Forum decides on the size and allocation of Growth Fund.

4. BACKGROUND INFORMATION

4.1 For 2014-15, 2015-16 and 2016-17 the Growth Fund allocation has been set at **£3.75 million** in each year, with contributions of **£2.25 million** from DSG balances arising out spending outturns from 2012-13 and 2013-14. A further contribution of **£0.75 million** is earmarked for 2016-17. These are one-off amounts and cannot be guaranteed to recur in future years.

4.2 These contributions reduce the amount that is removed from the headline DSG funding for Growth before the application of the Local Funding Formula. The deduction from the DSG for the Growth Fund affects all schools including academies and free schools.

- 4.3 The present criteria for supporting schools that are good or outstanding with falling rolls from the Growth Fund is open ended and can cause a significant call on the Fund which will impact on its overall allocations. It is therefore proposed to set a new cap of **£100,000** to ensure both affordability and support to such schools in that position.
- 4.4 This cap and its implications will be reviewed by the Schools Block Review Group.
- 4.5 The principle of supporting schools that undergoing permanent expansion **planned by the LA** remains unchanged. Some changes have been made to the text to make clear the calculation used to allocate Growth Fund support.
- 4.6 Final Growth Fund Allocations are shown at Appendix B and amounts to **£3.25 million**, based on existing criteria and most recent data. However, should there more bulge classes proposed in year, Schools Forum will be kept updated on these changes for its approval.

5. **CONSULTATION**

- 5.1 The LA is required to consult and get Schools Forum agreement on the amount and allocation of the Growth Fund.

Appendix A: Amended Criteria for the allocation of funding through the Growth Fund

Permanent Expansions:

AWPU and other Pupil Driven factors:

- Any primary and secondary school and academy undergoing planned expansion e.g. reception classes and at year 7 will be eligible. Payment will be 7/12ths of the annual factor rates for AWPU, FSM6, IDACI, EAL, Low Attainment and Mobility to cover the additional costs incurred between 1 September and 31 March.
- From September 2015 the LA will now fund permanently expanding schools on the actual October Census data averaged for the previous 2 years. Where growth data is not available the LA will use actual NOR + 30 per form of additional entry. New schools will be funded on 30 per form for the first year.
- These figures will then be adjusted to take account of the actual number of pupils in the existing Year 6 on the October School Census. This is done as some schools undergoing permanent expansion previously had bulge classes and there is a need to avoid double funding.
- This will apply to all schools, academies and free schools who are funded through the Schools Block DSG. The table below shows three examples:

Table 1: Calculation of additional funding for permanently expanding schools

School	Expansion / new school	Average NOR 2013 and 2014 (where applicable)	Number in Year 6	Additional Funding
Davies Lane	2FE to 4FE	117	64	53
Mayville Primary	2FE to 3FE	86	68	18
Emmanuel Primary	1FE	28	0	28

- These provisional allocations will be adjusted where the actual NOR in the October census is higher than the forecasted figure. It is not proposed to claw back funding if NOR are lower, as schools need a baseline figure with which to work.
- For the next financial year, following admission, funding for the year group will be based on the actual NOR in the October census. Additional funding through the Growth Fund will cease when schools have reached capacity in all year groups. This funding of planned growth in pupil numbers is net of any bulge classes in the outgoing year 6 or year 11.

Leadership and Management Allowance:

- Where the planned expansion of the maintained school or academy is by at least **1FE**, the Local Authority will provide additional Leadership and Management funding worth £150,000 over the first three financial years in recognition of the increase in management costs associated with a significant school expansion.

Expansion onto Second Sites:

- Where the planned expansion of the maintained school or academy involves a second site, the Local Authority will provide a split-site payment through delegated funding. In addition, the Local Authority will make a tapered payment to such schools in the first few years of expansion on to the second site in recognition of the fact that all the premises costs incurred for utilities, caretaking and cleaning and maintenance are now met solely out of AWPU. In the first few years the additional pupils do not generate sufficient funding to meet these costs. Broadly speaking the average costs (per pupil) have been calculated at £150 per pupil, e.g. 3FE site costs @£94,500 utilities and caretaking cost.
- From April 2015 a revised formula will be used as set out in the table below. This relates to a 2FE expansion but the same method would apply to a 1FE or 3FE expansion on a second site.
 - Applies to any school permanently expanding onto an additional site.
 - An additional payment is made for the first 5 years of the expansion.
 - Additional payment is based upon the capacity of the new site less the planned number of pupils in the expansion e.g. the shortfall in pupils compared with site capacity.
 - Payment will be £150 per pupil to cover premises costs other than rates.

Table 2: Calculation of funding for planned expansions onto a second site

Capacity	Year of expansion	Planned number of pupils on site	Shortfall	Funding at £150 per pupil
420	1	60	360	£54,000
420	2	120	300	£45,000
420	3	180	240	£36,000
420	4	240	180	£27,000
420	5	300	120	£18,000

Bulge Classes:

AWPU and other Pupil Driven factors:

- Any primary and secondary school and academy accepting an additional temporary (bulge) class will be eligible.
- Payment will be 7/12ths of the annual factor rates for AWPU, FSM6, IDACI, EAL, Low Attainment and Mobility to cover the additional costs incurred between 1 September and 31 March.
- Schools and academies will be funded for the planned number of pupils e.g. 30 per extra FE. However from the next financial year, funding for the year group will be based on the actual NOR in the October school census, subject to applying a class size funding guarantee (see below).

Resources:

- Where there is only a temporary one-off expansion, the maintained school or academy will receive an extra £200 per pupil towards the cost of additional resources over and above the AWPU and targeted pupil support. This is equivalent to a one-off payment of £6,000 per class.

Class size guarantee:

- The Local Authority will give a minimum class size guarantee of AWPU funding for 25 pupils per class or FE. This means that if the actual NOR in the class are only 23 at the time of the October census, the Local Authority will increase AWPU funding as if the actual NOR were 25. Class size protection for bulge classes will be capped when the shortfall reaches 10 pupils. This guarantee applies for as long as the bulge class remains within the school. If numbers in the bulge class fall to zero, the class size protection will cease.

Reception and Key Stage 1 classes:

- Where as a result of an appeal or the Local Authority asks a school to take a child (e.g. looked-after or with SEN) which takes the number in the reception or Key stage class to over 30, the Local Authority will meet the cost of an additional teacher to keep the class size at 30 or below. Payments will be made termly in arrears based on submitted evidence of costs incurred by the school.

Good and outstanding schools with surplus places over 20%:

- Where a school has more than 20% surplus places and has a current Ofsted judgement of good or outstanding and is in an area where the Local Authority expects school rolls to rise within three years, the Local Authority will allocate additional funding according to the following formula:

Number of pupils below 80% capacity x 75% of AWPU rate.

Example: Secondary school with capacity of 900 has 700 on roll in October census.

$$80\% \text{ capacity} = 900 \times 0.8 = 720$$

$$\text{No. of pupils below 80\% capacity} = 720 - 700 = 20$$

AWPU rate is £4,800.

$$75\% \text{ of AWPU rate} = £4,800 \times 0.75 = £3,600$$

$$\text{Funding} = 20 \times £3,600 = £72,000.$$

Appendix B: Proposed Criteria for the allocation of funding through the Growth Fund

1 Permanent Expansions

AWPU and other Pupil Driven factors

- 1.1 Any primary and secondary schools, academies and free schools undergoing expansion planned by the LA, e.g. reception classes and at year 7 will be eligible. Payment will be 7/12ths of the annual factor rates for AWPU, FSM6, IDACI, EAL, Low Attainment and Mobility to cover the additional costs incurred between 1 September and 31 March.
- 1.2 The LA funds permanently expanding primary schools on the actual October Census data for Reception averaged over the previous two counts prior to the Academic Year of Growth. For example, for an expansion in September 2016, the average is taken over the counts at October 2014 and October 2015. Where growth data is not available the LA will use actual NOR + 30 per form of additional entry at Reception. New schools will be funded on 30 per form for the first year. For secondary schools the same applies, but using Year 7 data.
- 1.3 These figures will then be adjusted to take account of the actual number of pupils in the existing Year 6 or Year 11 on the October School Census. This is done to avoid double funding where there are bulge classes as well as permanent expansions.
- 1.4 These provisional allocations will be adjusted where the actual NOR in the October census is higher than the forecasted figure. It is not proposed to claw back funding if NOR are lower, as schools need a baseline figure with which to work.
- 1.5 For the next financial year, following admission, funding for the year group will be based on the actual NOR in the October census. Additional funding through the Growth Fund will cease when schools have reached capacity in all year groups. This funding of planned growth in pupil numbers is net of any bulge classes in the outgoing year 6 or year 11.

Leadership and Management Allowance

- 1.6 Where the planned expansion of the maintained school or academy is by at least 1FE, the Local Authority will provide additional Leadership and Management funding worth £150,000 over the first three financial years in recognition of the increase in management costs associated with a significant school expansion.

Expansion onto Second Sites

- 1.7 Where the planned expansion of the maintained school or academy involves a second site, the Local Authority will provide a split-site payment through delegated funding. In addition, the Local Authority will make a tapered payment to such schools in the first few years of expansion on to the second site in recognition of the fact that all the premises costs incurred for utilities, caretaking and cleaning and maintenance are now met solely out of AWPU. In the first few years the additional pupils do not generate sufficient funding to meet these costs. Broadly speaking the average costs (per pupil) have been calculated at £150 per pupil, e.g. 3FE site costs @£94,500 utilities and caretaking cost.

1.8 The formula used is set out in the table below. This relates to a 2FE expansion but the same method would apply to a 1FE or 3FE expansion on a second site.

- Applies to any school permanently expanding onto an additional site.
- An additional payment is made for the first 5 years of the expansion.
- Additional payment is based upon the capacity of the new site less the planned number of pupils in the expansion e.g. the shortfall in pupils compared with site capacity.
- Payment will be £150 per pupil to cover premises costs other than rates.

Table : Calculation of funding for planned expansions onto a second site

Capacity	Year of expansion	Planned number of pupils on site	Shortfall	Funding at £150 per pupil
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420	2	120	300	£45,000
420	3	180	240	£36,000
420	4	240	180	£27,000
420	5	300	120	£18,000

2 Bulge Classes

AWPU and other Pupil Driven factors

- 2.1 Any primary and secondary school and academy accepting an additional temporary (bulge) class planned by the LA will be eligible.
- 2.2 Payment will be 7/12ths of the annual factor rates for AWPU, FSM6, IDACI, EAL, Low Attainment and Mobility to cover the additional costs incurred between 1 September and 31 March.
- 2.3 Schools and academies will be funded for the planned number of pupils e.g. 30 per extra FE. However from the next financial year, funding for the year group will be based on the actual NOR in the October school census, subject to applying a class size funding guarantee (see below).

Resources

- 2.4 Where there is only a temporary one-off expansion, the maintained school or academy will receive an extra £200 per pupil towards the cost of additional resources over and above the AWPU and targeted pupil support. This is equivalent to a one-off payment of £6,000 per class.

Class size guarantee

- 2.5 The Local Authority will give a minimum class size guarantee of AWPU funding for 25 pupils per class or FE. This means that if the actual NOR in the class are only 23 at the time of the October census, the Local Authority will increase AWPU funding as if the actual NOR were 25. Class size protection for bulge classes will be capped when the shortfall reaches 10 pupils (i.e. a maximum of 15 places are guaranteed). This guarantee applies for as long as the bulge class remains within the school. If numbers in the bulge class fall to zero, the class size protection will cease.

Reception and Key Stage 1 classes

- 2.6 Where as a result of an appeal or the Local Authority asks a school to take a child (e.g. looked-after or with SEN) which takes the number in the reception or Key stage class to over 30, the Local Authority will meet the cost of an additional teaching assistant to keep the class size at 30 or below. Payments will be made termly in arrears based on submitted evidence of costs incurred by the school.

3 Good and Outstanding schools with surplus places over 20%

- 3.1 Where a school has more than 20% surplus places and has a current Ofsted judgement of good or outstanding and is in an area where the Local Authority expects school rolls to rise within three years, the Local Authority will allocate additional funding according to the following formula:

Number of pupils below 80% capacity x 75% of AWPU rate.

Example: Secondary school with capacity of 900 has 700 on roll in October census.

80% capacity = $900 \times 0.8 = 720$

No. of pupils below 80% capacity = $720 - 700 = 20$

AWPU rate is £4,800.

75% of AWPU rate = $£4,800 \times 0.75 = £3,600$

Funding = $20 \times £3,600 = £72,000$.

- 3.2 This support to Good and Outstanding schools with surplus places over 20% is capped at £100,000.

Primary Schools	DFE No	A/Y of Expansion	FE Expansion	Pupils -Sept 2016	AWPU	TPS Rate	TPS	L+M	Resources	Second Sites	Total
					£3,482.00				£6,000		
			A	B	C	D	E	F	G	J	K
Permanent Expansions:											
Barclay Primary	3308	2014/15	2	31	£ 106,636	£ 699.84	£ 21,433	£ 50,000		£ 39,750	£ 217,819
Buxton All-through	4000	2011/12	1	13	£ 45,701	£ 759.03	£ 9,962				£ 55,664
Chingford Hall Primary	2055	2015/16	1	15	£ 50,779	£ 975.88	£ 14,232				£ 65,011
Davies Lane Primary	2015	2012/13	2	38	£ 132,026	£ 611.59	£ 23,190			£ 21,750	£ 176,965
Edinburgh Primary	2030	2009/10	2	9	£ 32,499	£ 797.41	£ 7,443				£ 39,941
Emmanuel Primary	2019	2012/13	1	17	£ 57,888	£ 923.32	£ 15,350				£ 73,238
George Mitchell All Through	4062	2010/11	1	16	£ 55,857	£ 773.21	£ 12,404				£ 68,261
Gwyn Jones Primary	2069	2010/11	1	16	£ 56,873	£ 517.39	£ 8,451				£ 65,323
Hillyfield Primary	2018	2012/13	4	55	£ 191,945	£ 795.36	£ 43,844			£ 32,625	£ 268,414
Jenny Hammond	2079	2015/16	1	19	£ 64,997	£ 586.72	£ 10,952				£ 75,949
Mayville Primary	2084	2015/16	1	10	£ 33,514	£ 820.48	£ 7,897				£ 41,411
Mission Grove Primary	2074	2012/13	2	16	£ 55,857	£ 811.27	£ 13,014			£ 11,625	£ 80,496
Newport Primary	2023	2011/12	1	16	£ 56,873	£ 742.01	£ 12,119				£ 68,992
St Marys C of E Primary	3307	2011/12	1	33	£ 115,777	£ 453.42	£ 15,076				£ 130,853
Stoneydown Park Primary	2076	2014/15	2	20	£ 70,075	£ 788.73	£ 15,873	£ 20,000		£ 39,750	£ 145,698
The Woodside	2033	2010/11	3	22	£ 76,169	£ 1,013.58	£ 22,172			£ 32,625	£ 130,966
Thorpe Hall Primary	2049	2014/15	1	9	£ 32,499	£ 702.26	£ 6,554				£ 39,053
Walthamstow Primary Academy	2038	2015/16	2	28	£ 96,480	£ 152.94	£ 4,238				£ 100,718
Willow Brook Primary	2029	2009/10	1	10	£ 33,514	£ 952.01	£ 9,163				£ 42,677
Winns Primary	2050	2010/11	1	11	£ 36,561	£ 793.59	£ 8,333				£ 44,894
TOTAL- Primary Permanent Expansion			31	403	£ 1,402,521		£ 281,699	£ 70,000		£ 178,125	£ 1,932,345
Secondary Schools			FE	Pupils	AWPU	TPS Rate	TPS	L+M			Total
					£4,760						
Highams Park	5400	2012/13	1	13	£ 61,087	£ 656.66	£ 8,427				£ 69,514
Willowfield	4066	2014/15	2	32	£ 151,328	£ 1,096.98	£ 34,875				£ 186,203
Eden Girls	4002	2013/14	3.3	59	£ 280,443	£ 1,189.69	£ 70,092				£ 350,536
TOTAL			6.3	104	£ 492,858		£ 113,394	£ -	£ -		£ 606,253

Bulge Classes Protection:	DfE No	A/Y(s) of 1st Bulge Class	A/Y(s) of 2nd Bulge Class	A/Y(s) of 3rd Bulge Class	A/Y(s) of 4th Bulge Class			Protection (max 15 places)	Class size Protection		Total
								Numbers	£3,482.00		
Barclay Primary	3308	2010/11	2011/12					5	£ 17,410		£ 17,410
Buxton All-through	4000	2010/11						5	£ 17,410		£ 17,410
Chapel End Juniors	2034	2011/12						15	£ 52,230		£ 52,230
Chase Lane Primary	2001	2012/13						2	£ 6,964		£ 6,964
Coppermill Primary	2075	2010/11	2012/13					1	£ 3,482		£ 3,482
Davies Lane Primary	2015	2010/11	2011/12					11	£ 38,302		£ 38,302
Edinburgh Primary	2030	2010/11						4	£ 13,928		£ 13,928
George Mitchell All Through	4062	2010/11						13	£ 45,266		£ 45,266
George Tomlinson	2072	2009/10						2	£ 5,803		£ 5,803
Gwyn Jones Primary	2069	2010/11	2011/12					8	£ 27,856		£ 27,856
Larkswood Primary	2005	2011/12	2014/15					6	£ 20,892		£ 20,892
Mayville Primary	2084	2009/10						6	£ 21,763		£ 21,763
Mission Grove Primary	2074	2009/10	2011/12					3	£ 9,866		£ 9,866
Parkside Primary	2078	2015/16						1	£ 3,482		£ 3,482
Riverley Primary	2035	2009/10						6	£ 21,763		£ 21,763
Roger Ascham Primary	2040	2009/10	2011/12	2012/13	2013/14			7	£ 24,954		£ 24,954
Stoneydown Park Primary	2076	2009/10						1	£ 4,933		£ 4,933
Thorpe Hall Primary	2049	2010/11	2012/13					9	£ 31,338		£ 31,338
Willow Brook Primary	2029	2009/10						6	£ 21,763		£ 21,763
Winns Primary	2050	2009/10						6	£ 21,763		£ 21,763
TOTAL -class size protection								118	£ 411,166		£ 411,166
TOTAL 2016-17 Growth											£ 2,949,764
Overspend 2015-16											£ 80,487
Contingency											£ 219,749
GrandTotal											£ 3,250,000

Waltham Forest Schools Forum

Dates for Waltham Forest Schools Forum to set budgets for Financial Year 2016-17

Wednesday Evenings from 17.30;

Tea, Coffee and light buffet from 17.00

Date	Forward Plan – To be confirmed
8 June 2016	
14 September 2016	
9 November 2016	
11 January 2017	
8 February 2017	<i>(Spring Half-term will be from 13 to 17 February 2017)</i>
8 March 2017	Reserved for any outstanding items prior to March 2017 Cabinet <i>(Cabinet date for March 2017 to be confirmed)</i>