

LONDON BOROUGH OF WALTHAM FOREST

Meeting / Date	<b>SCHOOLS FORUM</b> <b>13 January 2016</b>	Agenda Item	<b>5</b>
Report Title	<b>Local Funding Formula and Growth Fund Allocations for 2016-17</b>		
Decision/ Discussion/ Information	For Information and decision		
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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 - Growth Fund Allocations for 2016-17 Appendix E - Comparison of funding from factors 2015-16 and 2016-17		

## 1. SUMMARY

- 1.1 This report informs 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 takes account of:
- (a) Actual numbers on roll in the October 2015 Schools Census.
  - (b) Principles and changes previously agreed at Schools Forum of 16 September 2015, on how funding is allocated through the Local Funding Formula [LFF].
  - (c) The amount to be retained for the Growth Fund for 2016-17 and its allocation.

- 1.2 This report shows that a total of **£191.95m** is available for delegation to schools – an increase of **£2.489m** of which **£2.467m** is due to an increase in pupil numbers of 1,657 (37,326 in October 2016 compared to 35,669 in October 2015) and the Schools Block Unit of Funding (SBUF) rising by £32.84 to £5,230.19 in 2016-17 from £5,197.35 in 2015-16. The balance of **£0.022 million** is due to the net position following the suspension of the transfer to the High Needs block and the balance required for the Growth Fund.
- 1.3 The proportion of total funding allocated to deprivation remains the same in each phase as in 2015-16. For primary schools this is **7.8%** or **£8.51m** and for secondary **13.5%** or **£11.20m**. This gives an overall amount of **£19.71m** or **10.3%**

The rates for FMS6 and IDACI bands have been changed in order to retain the deprivation funding proportions. Other than the increase in AWPU, the rates applied to the factors other than deprivation factors are unchanged.

## 2. RECOMMENDATIONS

### Schools Forum to agree that:

- 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%**.
- 2.4 The Growth Fund allocations for 2016-17 as set out in Appendix F.

### Schools Forum to note 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

**That voting members of Schools Forum, who are Governors and Head Teachers of maintained primary schools only, agree**

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

**3. REASON**

The LA is required to consult with the Schools Forum regarding any changes to be made to the agreed funding rates set out in the LFF.

**4. BACKGROUND INFORMATION**

*Determination of the Control Total*

- 4.1 The factors determining the Control Total for 2016-17 are set out in Table 1 below:

**Table 1: Changes to Schools Block DSG Control Total for 2016-17**

Source of funding	Pupil Numbers	Schools Block General Unit of Funding	2016-17
			£m
Baseline amount	37,326	£5,230.19	195.22
Adjustment for Non-Recoupment Academies			0.056
Deduction for Growth Fund			-3.25
Deduction for Central items			-0.95
Add Block Transfer from the Early Years Block			0.13
Brought forward Balance to support growth Fund			0.75
<b>Control Total for allocation in 2016-17</b>			<b>191.95</b>

Changes to the Funding Factor Rates within LFF

- 4.2 In September 2015, Schools Forum agreed the following principles to be applied in making funding decisions:
- Transparency
  - Fairness
  - Stability
  - Support for vulnerable students
- (a) The AWPU for primary schools be raised by such amounts to balance within allocated resources.
- (b) That deprivation rates are adjusted to preserve 2015-16 proportions for each sector.
- 4.3 **Appendix A, B1 and B2** to this report shows effect of the changes as recommended to the LFF for 2016-17 to achieve the above principles. **Appendix E** shows the variation in each LFF funding factor and the impact of changes in deprivation factors.
- 4.4 There are significant variations within each sector. This is mainly due to a fall in NOR and in few instances a change in pupil characteristics. Eighteen primary schools face a cash reduction in 2016-17, the biggest three being Dawlish Primary (-8.43%); Riverley Primary (-7.41%); and Mayville Primary (-6.01%). On the other hand, some primary schools have significant increases e.g. Parkside Primary (13.87%); Stoneydown Primary (12.48%); and Hillyfield Primary (10.61%).
- 4.5 Ten secondary schools face a cash reduction in 2016-17, the largest three being George Mitchell (-6.39%); Rushcroft (-4.73%); and Leytonstone (-2.63%). At the other end there are cash rises for Eden Girls (17.29%) Willowfield (6.7%) and Chingford Foundation (4.25%)
- 4.6 **Appendix A** is a guide to overall funding as in addition to LFF, it includes MFG adjustments, Growth Fund, and High Needs funding. It also includes forecasted pupil premium based upon the latest (December 2015) notification on allocations for 2015-16. Pupil Premium will be adjusted in-year following the January 2016 Census. Early Years funding will not be available until the February meeting of Schools Forum.
- 4.7 The Government intends to issue consultation documents early in 2016 in relation to funding arrangements for 2017-18. The Government is committed to preserving funding per pupil nationally and will be seeking views on reducing variations in per pupil funding across all of England.

Maintained Primary Contingency

- 4.8 At Schools Forum on 12 November 2014, maintained primary schools agreed to de-delegate £183,300 as a contingency for financial year 2015-16. To date, there has been only one call on the contingency: £200 to assist a school with a problem in its opening balances.
- 4.9 The LA proposes that it retains this contingency for 2016-17, the alternative being that the contributions to the fund are returned.

**5. CONSULTATION**

- 5.1 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 is being asked to agree the final allocation of funding for 2016-17 based on these recommendations.



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	£ 8,092,083	£ 88,015	£ 94,257	£ 422,246	£ 705,540	£ 9,402,141	1462	£ 7,903,458	£ 68,443	£ 100,341	£ 400,430	£ 705,540	£ 9,178,212	£ 223,929	2.44%	
4062 George Mitchell	849	£ 4,885,317	£ 120,125	£ 93,406	£ 23,347	£ 411,180	£ 5,533,375	900	£ 5,358,035	£ 13,802	£ 94,505	£ 33,280	£ 411,180	£ 5,910,802	-£ 377,427	-6.39%	
<b>TOTAL</b>	<b>2,357</b>	<b>£ 12,977,400</b>	<b>£ 208,141</b>	<b>£ 187,663</b>	<b>£ 445,593</b>	<b>£ 1,116,720</b>	<b>£ 14,935,517</b>	<b>2362</b>	<b>£ 13,261,493</b>	<b>£ 82,245</b>	<b>£ 194,846</b>	<b>£ 433,710</b>	<b>£ 1,116,720</b>	<b>£ 15,089,014</b>	<b>-£ 153,497</b>	<b>-1.02%</b>	
4060 Frederick Bremer	852	£ 5,917,826			£ 537,639	£ 461,890	£ 6,917,356	879	£ 5,881,213	£ -	£ -	£ 493,353	£ 461,890	£ 6,836,456	£ 80,900	1.18%	
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	£ 4,460,621		£ 194,744	£ 148,058	£ 267,410	£ 5,070,834	656	£ 4,082,548	£ 61,250	£ 247,786	£ 93,424	£ 267,410	£ 4,752,418	£ 318,416	6.70%	
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%	
<b>TOTAL</b>	<b>7,168</b>	<b>£ 46,197,016</b>	<b>£ 236,653</b>	<b>£ 194,744</b>	<b>£ 1,357,614</b>	<b>£ 2,859,230</b>	<b>£ 50,845,258</b>	<b>7148</b>	<b>£ 45,994,539</b>	<b>£ 254,448</b>	<b>£ 308,476</b>	<b>£ 1,293,956</b>	<b>£ 2,859,230</b>	<b>£ 50,710,649</b>	<b>£ 134,609</b>	<b>0.27%</b>	
Academies:																	
4001 Rushcroft	585	£ 3,886,502	-£ 55,945		£ 53,327	£ 253,385	£ 4,137,269	630	£ 4,025,984	£ -	£ -	£ 63,444	£ 253,385	£ 4,342,813	-£ 205,544	-4.73%	
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		£ 75,787	£ 165,259	£ 289,850	£ 7,096,523	1146	£ 6,283,409	£ -	£ 75,041	£ 162,303	£ 289,850	£ 6,810,603	£ 285,920	4.20%	
5401 Chingford	1181	£ 6,793,410	-£ 80,535		£ 591,729	£ 370,260	£ 7,674,865	1187	£ 6,533,860	-£ 68,572	£ -	£ 526,691	£ 370,260	£ 7,362,239	£ 312,626	4.25%	
4002 Eden Girls'	252	£ 1,659,140	-£ 15,448	£ 347,065	£ 14,990	£ 59,840	£ 2,065,586	152	£ 1,356,316	£ -	£ 336,202	£ 8,744	£ 59,840	£ 1,761,102	£ 304,484	17.29%	
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%	
<b>TOTAL</b>	<b>4,660</b>	<b>£ 27,860,535</b>	<b>-£ 151,928</b>	<b>£ 422,852</b>	<b>£ 981,720</b>	<b>£ 1,642,795</b>	<b>£ 30,755,974</b>	<b>4595</b>	<b>£ 27,319,898</b>	<b>-£ 43,819</b>	<b>£ 411,243</b>	<b>£ 860,516</b>	<b>£ 1,642,795</b>	<b>£ 30,190,633</b>	<b>£ 565,342</b>	<b>1.87%</b>	
<b>GRAND TOTAL</b>	<b>14,185</b>	<b>£ 87,034,951</b>	<b>£ 292,866</b>	<b>£ 805,259</b>	<b>£ 2,784,927</b>	<b>£ 5,618,745</b>	<b>£ 96,536,748</b>	<b>14105</b>	<b>£ 86,575,930</b>	<b>£ 292,874</b>	<b>£ 914,565</b>	<b>£ 2,588,181</b>	<b>£ 5,618,745</b>	<b>£ 95,990,295</b>	<b>£546,453.07</b>	<b>0.57%</b>	
Primary and Secondary	37,330	£ 191,951,434	£0	£ 3,193,266	£ 7,196,612	£ 14,815,845	£ 217,157,157	36832	£ 189,461,388	-£ 2	£ 3,578,119	£ 6,998,385	£ 14,815,845	£ 214,853,736	£1,956,619.95	0.91%	





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

Secondary	NOR	AWPU	FSM6	IDACI 1	IDACI 2	IDACI 3	IDACI 4	IDACI 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	741	£ 3,550,960	£ 514,094	£ 9,189	£ 34,533	£ 107,701	£ 56,815	£ 1,976	£ 103,033	£ 146,111	£ 61,395	£ 125,000	£ 15,000	£ 34,870	£ -	£ 4,760,677
4062 George Mitchell	512	£ 2,437,120	£ 368,540	£ 15,900	£ 12,600	£ 38,000	£ 59,000	£ 2,000	£ 57,702	£ 145,106	£ 800	£ 125,000	£ 55,000	£ 97,490	£ -	£ 3,414,257
<b>TOTAL</b>	<b>1253</b>	<b>£ 5,988,080</b>	<b>£ 882,633</b>	<b>£ 25,089</b>	<b>£ 47,133</b>	<b>£ 145,701</b>	<b>£ 115,815</b>	<b>£ 3,976</b>	<b>£ 160,735</b>	<b>£ 291,217</b>	<b>£ 62,195</b>	<b>£ 250,000</b>	<b>£ 70,000</b>	<b>£ 132,360</b>	<b>£ -</b>	<b>£ 8,174,935</b>
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	£ 40,000	£ 84,455	£ -	£ 4,460,621
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
<b>TOTAL</b>	<b>7168</b>	<b>£ 34,119,680</b>	<b>£ 4,476,703</b>	<b>£ 177,691</b>	<b>£ 187,977</b>	<b>£ 1,052,508</b>	<b>£ 327,981</b>	<b>£ 66,193</b>	<b>£ 385,888</b>	<b>£ 1,080,773</b>	<b>£ 29,000</b>	<b>£ 1,125,000</b>	<b>£ 460,000</b>	<b>£ 1,398,226</b>	<b>£ 1,309,397</b>	<b>£ 46,197,016</b>
Academies:																
4001 Rushcroft	585	£ 2,784,600	£ 369,829	£ 13,323	£ 12,772	£ 104,178	£ 25,544	£ 16,027	£ 84,578	£ 115,208	£ 208,500	£ 125,000	£ -	£ 26,943	£ -	£ 3,886,502
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
<b>TOTAL</b>	<b>4660</b>	<b>£ 22,181,600</b>	<b>£ 2,594,282</b>	<b>£ 86,197</b>	<b>£ 101,051</b>	<b>£ 640,134</b>	<b>£ 175,095</b>	<b>£ 96,972</b>	<b>£ 211,544</b>	<b>£ 560,550</b>	<b>£ 208,500</b>	<b>£ 750,000</b>	<b>£ 40,000</b>	<b>£ 214,609</b>	<b>£ -</b>	<b>£ 27,860,535</b>
<b>TOTAL</b>	<b>13081</b>	<b>£ 62,289,360</b>	<b>£ 7,953,618</b>	<b>£ 288,977</b>	<b>£ 336,161</b>	<b>£ 1,838,343</b>	<b>£ 618,890</b>	<b>£ 167,141</b>	<b>£ 758,166</b>	<b>£ 1,932,541</b>	<b>£ 299,695</b>	<b>£ 2,125,000</b>	<b>£ 570,000</b>	<b>£ 1,745,195</b>	<b>£ 1,309,397</b>	<b>£ 82,232,485</b>

Appendix C - School Level Pupil Characteristics October 2015

Primary Schools	Primary FSM6	Primary IDACI 3	Primary IDACI 4	Primary IDACI 5	Primary EAL 3	Low Attainment under new EYFSP Proportion	Low Attainment under old FSP Proportion 73	Primary Mobility	Secondary FSM	Secondary IDACI 3	Secondary IDACI 4	Secondary IDACI 5	Secondary EAL 3	Secondary Low Attainment
Chase Lane Primary	0.28	0.31	0.07	0.00	0.27	0.49	0.12	0.06						
Longshaw Primary	0.36	0.51	0.03	0.00	0.26	0.31	0.14	0.08						
Whitehall Primary	0.38	0.57	0.02	0.00	0.14	0.50	0.27	0.09						
Davies Lane Primary	0.21	0.12	0.10	0.01	0.38	0.18	0.12	0.11						
Downsell Primary	0.43	0.41	0.11	0.00	0.50	0.45	0.28	0.11						
Newport Primary	0.26	0.07	0.02	0.00	0.40	0.43	0.21	0.13						
Chapel End Infants	0.24	0.11	0.01	0.02	0.63	0.47	0.00	0.03						
Edinburgh Primary	0.29	0.16	0.01	0.01	0.39	0.43	0.18	0.14						
Greenleaf Primary	0.25	0.18	0.02	0.02	0.26	0.15	0.19	0.06						
Handsworth Primary	0.13	0.02	0.05	0.00	0.14	0.20	0.04	0.04						
Thorpe Hall Primary	0.32	0.07	0.10	0.00	0.30	0.44	0.21	0.09						
The Winns Primary	0.34	0.34	0.02	0.13	0.30	0.38	0.20	0.14						
Woodford Green Primary	0.32	0.36	0.00	0.00	0.17	0.27	0.14	0.14						
Oakhill Primary	0.15	0.03	0.04	0.00	0.10	0.31	0.14	0.07						
Henry Maynard Primary	0.27	0.32	0.02	0.00	0.20	0.26	0.08	0.06						
South Grove Primary	0.39	0.41	0.02	0.01	0.31	0.20	0.38	0.12						
Dawlish Primary	0.24	0.07	0.03	0.00	0.37	0.47	0.16	0.12						
Gwyn Jones Primary	0.17	0.02	0.03	0.00	0.29	0.33	0.21	0.08						
George Tomlinson Primary	0.26	0.10	0.04	0.00	0.38	0.38	0.19	0.12						
Mission Grove Primary	0.27	0.25	0.05	0.01	0.47	0.24	0.19	0.12						
Coppermill Primary School	0.30	0.19	0.08	0.00	0.32	0.41	0.20	0.13						
Stoneydown Park Primary	0.29	0.16	0.18	0.00	0.40	0.40	0.28	0.07						
Parkside Primary School	0.41	0.45	0.03	0.00	0.30	0.37	0.24	0.13						
The Jenny Hammond Primary	0.30	0.25	0.11	0.00	0.21	0.36	0.08	0.10						
Ainslie Wood Primary	0.31	0.29	0.03	0.00	0.21	0.38	0.21	0.15						
Barn Croft Primary	0.27	0.18	0.02	0.00	0.43	0.43	0.33	0.13						
Mayville Primary School	0.39	0.27	0.24	0.00	0.37	0.25	0.14	0.10						
Chingford C of E Primary	0.15	0.27	0.00	0.00	0.04	0.58	0.10	0.31						
St Mary's Catholic Primary	0.10	0.24	0.01	0.00	0.07	0.41	0.02	0.01						
St. Joseph's Catholic Junior	0.33	0.21	0.17	0.00	0.13	0.56	0.20	0.06						
St. Saviour's C of E Primary	0.34	0.32	0.11	0.01	0.26	0.34	0.29	0.12						
St Joseph's Catholic Infants	0.13	0.14	0.12	0.00	0.73	0.56	0.00	0.03						
St. Mary's C of E Primary	0.19	0.25	0.06	0.00	0.13	0.25	0.13	0.12						
Selwyn Primary	0.42	0.12	0.25	0.00	0.27	0.24	0.21	0.13						
Our Lady and St George's Catholic Primary	0.25	0.34	0.07	0.00	0.19	0.33	0.08	0.07						
St. Patricks Catholic Primary	0.23	0.35	0.11	0.03	0.38	0.40	0.07	0.08						
Yardley Primary	0.26	0.40	0.00	0.00	0.12	0.18	0.08	0.04						
Hillyfield Primary Academy	0.32	0.49	0.02	0.07	0.34	0.44	0.21	0.08						
Willow Brook Primary Academy	0.43	0.20	0.27	0.01	0.39	0.41	0.27	0.13						
The Woodside Primary Academy	0.43	0.41	0.13	0.00	0.45	0.48	0.28	0.53						
Chapel End Junior Academy	0.37	0.10	0.01	0.01	0.17	0.54	0.13	0.24						
Riverley Primary Academy	0.37	0.18	0.26	0.00	0.35	0.36	0.16	0.09						
Sybourn Primary Academy	0.30	0.34	0.03	0.00	0.51	0.38	0.32	0.13						
Larkwood Primary	0.33	0.33	0.03	0.00	0.18	0.20	0.15	0.08						
Thomas Gamuel Academy	0.36	0.27	0.02	0.00	0.46	0.42	0.15	0.57						
Roger Ascham Primary Academy	0.45	0.42	0.01	0.24	0.30	0.52	0.25	0.09						
Chingford Hall Academy	0.53	0.40	0.39	0.01	0.30	0.55	0.21	0.08						
Whittingham Primary Academy	0.36	0.63	0.02	0.18	0.33	0.40	0.28	0.10						
Walthamstow Primary Academy	0.00	0.38	0.03		0.00	0.00	0.00	0.00						

Appendix C - School Level Pupil Characteristics October 2015

Barclay Primary Academy	0.30	0.18	0.07	0.01	0.35	0.32	0.20	0.09						
Emmanuel Community Academy	0.34	0.28	0.04	0.01	0.46	0.38	0.00	0.16						
<b>Secondary Schools</b>	<b>Primary FSM6</b>	<b>Primary IDACI 4</b>	<b>Primary IDACI 4</b>	<b>Primary IDACI 5</b>	<b>Primary EAL 3</b>	<b>Low Attainment yr 1-2</b>	<b>Low Attainment Yr 3-6</b>	<b>Primary Mobility</b>	<b>Secondary FSM</b>	<b>Secondary IDACI 3</b>	<b>Secondary IDACI 4</b>	<b>Secondary IDACI 5</b>	<b>Secondary EAL 3</b>	<b>Secondary Low Attainment</b>
Buxton	0.40	0.35	0.11	0.01	0.39	0.46	0.13	0.15	0.48	0.29	0.15	0.01	0.17	0.33
George Mitchell	0.36	0.10	0.41	0.00	0.45	0.51	0.15	0.11	0.50	0.15	0.23	0.01	0.14	0.47
Frederick Bremer									0.58	0.28	0.09	0.03	0.06	0.27
Heathcote									0.38	0.43	0.04	0.01	0.01	0.23
Norlington Boys									0.47	0.20	0.11	0.01	0.11	0.25
Willowfield									0.44	0.34	0.07	0.05	0.06	0.22
Leytonstone									0.41	0.18	0.13	0.01	0.10	0.23
Walthamstow School for Girls									0.37	0.27	0.05	0.01	0.02	0.17
Kelmscott									0.50	0.32	0.06	0.00	0.08	0.32
The Lammas									0.49	0.32	0.15	0.01	0.18	0.39
Holy Family									0.31	0.28	0.14	0.03	0.03	0.21
Rushcroft									0.49	0.36	0.09	0.05	0.18	0.33
Connaught School for Girls									0.38	0.11	0.12	0.00	0.03	0.17
Highams Park									0.28	0.12	0.07	0.00	0.02	0.19
Chingford									0.34	0.34	0.04	0.00	0.02	0.20
Eden Girls									0.42	0.30	0.14	0.02	0.27	0.13
Walthamstow Academy									0.57	0.45	0.07	0.17	0.03	0.17

Primary Schools		FE Expansion	Pupils - Sept 2016	AWPU	TPS Rate	TPS	L+M	Resources	Class Size Protection	Class size Protection	Second Sites	Total
			17.5	£3,450.50				£6,000	Numbers	£ 3,400		
		A	B	C	D	E	F	G	H	I	J	K
<b>Permanent Expansions:</b>												
Barclay Primary	3308	2	33.3	£ 114,729	£ 704.04	£ 23,409	£ 50,000				£ 39,750	£ 227,888
Buxton All-through	4000	1	13.1	£ 45,288	£ 1,140.49	£ 14,969			10	£ 34,000		£ 94,257
Chingford Hall Primary	2055	1	17.5	£ 60,384	£ 975.88	£ 17,078						£ 77,462
Davies Lane Primary	2015	2	38.2	£ 131,838	£ 596.46	£ 22,790			9	£ 30,600	£ 21,750	£ 206,978
Edinburgh Primary	2030	2	9.3	£ 32,205	£ 797.41	£ 7,443			0	£ -		£ 39,647
Emmanuel Primary	2019	1	16.6	£ 57,365	£ 931.79	£ 15,491				£ -		£ 72,856
George Mitchell All Through	4062	1	17.2	£ 59,377	£ 1,187.15	£ 20,429			4	£ 13,600		£ 93,406
Gwyn Jones Primary	2069	1	16.9	£ 58,313	£ 520.27	£ 8,793			8	£ 27,200		£ 94,306
Hillyfield Primary	2018	4	63.0	£ 217,382	£ 787.78	£ 49,630					£ 32,625	£ 299,637
Jenny Hammond	2079	1	20.1	£ 69,441	£ 586.72	£ 11,808						£ 81,249
Mayville Primary	2084	1	14.0	£ 48,307	£ 826.96	£ 11,577			10	£ 32,583		£ 92,468
Mission Grove Primary	2074	2	16.0	£ 55,352	£ 818.15	£ 13,124					£ 11,625	£ 80,101
Newport Primary	2023	1	16.3	£ 56,358	£ 746.00	£ 12,185						£ 68,543
St Marys C of E Primary	3307	1	33.3	£ 114,729	£ 455.22	£ 15,136						£ 129,865
Stoneydown Park Primary	2076	2	32.7	£ 112,716	£ 790.55	£ 25,825	£ 20,000				£ 39,750	£ 198,291
The Woodside	2033	3	21.9	£ 75,480	£ 1,394.79	£ 30,511					£ 32,625	£ 138,616
Thorpe Hall Primary	2049	1	30.6	£ 105,672	£ 705.12	£ 21,594			3	£ 10,200		£ 137,466
Parkside Primary	2078	1	17.8	£ 61,390	£ 844.74	£ 15,029				£ -		£ 76,419
Walthamstow Primary Academy	2038	2	35.0	£ 120,768	£ 152.94	£ 5,353						£ 126,120
Willow Brook Primary	2029	1	10.5	£ 36,230	£ 952.01	£ 9,996			8	£ 25,500		£ 71,726
Winns Primary	2050	1	10.5	£ 36,230	£ 792.58	£ 8,322			3	£ 11,333		£ 55,886
<b>TOTAL</b>		<b>32</b>	<b>483.9</b>	<b>£ 1,669,553</b>		<b>£ 360,492</b>	<b>£ 70,000</b>			<b>£ 185,017</b>	<b>£ 178,125</b>	<b>£ 2,463,187</b>
<b>Bulge Classes Protection:</b>												
Chapel End Juniors	2034								13	£ 44,200		£ 44,200
Chase Lane Primary	2001								4	£ 13,600		£ 13,600
Coppermill Primary	2075								1	£ 3,400		£ 3,400
Riverley Primary	2035								4	£ 12,750		£ 12,750
Roger Ascham Primary	2040								3	£ 11,333		£ 11,333
Selwyn Primary	3310								8	£ 27,200		£ 27,200
<b>TOTAL</b>									<b>88</b>	<b>£ 112,483</b>		<b>£ 112,483</b>
Secondary Schools		FE	Pupils	AWPU	TPS Rate	TPS	L+M		School Size Protection	School Size Protection		Total
				£4,760					Numbers	£ 3,600		
Highams Park	5400	1	14.0	£ 66,640	£ 653.34	£ 9,147						£ 75,787
Willowfield	4066	2	33.3	£ 158,270	£ 1,096.98	£ 36,474						£ 194,744
Eden Girls	4002	3.3	58.3	£ 277,667	£ 1,189.69	£ 69,398						£ 347,065
<b>TOTAL</b>		<b>6.3</b>	<b>105.583</b>	<b>£ 502,577</b>		<b>£ 115,020</b>	<b>£ -</b>	<b>£ -</b>	<b>£ -</b>	<b>£ -</b>		<b>£ 617,596</b>
Overspend 2015-16												£ 80,487
Overspend 2016-17 cfwd												-£ 23,753
<b>GrandTotal</b>												<b>£ 3,250,000</b>

## Appendix E1

### Deprivation Factors

- 1 In September 2015, Schools Forum agreed the following principles to be applied in making funding decisions: Transparency, Fairness, Stability and Support for vulnerable students.
- 2 That the AWPU for primary schools be raised by such amounts to balance within allocated resources, and that deprivation rates would be adjusted to preserve 2015-16 proportions for each sector.
- 3 When the APT data was received, it showed that for Free School Meals Ever 6, there were moderate changes: the percentage of eligible primary pupils fell by 2% (403.75 pupils), while for secondary schools, the percentage remained unchanged (down 2.77 pupils).
- 4 However, the IDACI was updated this year from the previous base of 2009. This has had a major impact, for example where there are no longer any pupils in IDACI 6.

**Table 1** below shows the changes in pupil characteristics

<b>Deprivation Comparator</b>							
<b>Numbers on Roll</b>		<b>2015-16</b>		<b>2016-17</b>			
Primary		23,788		24,244			
Secondary		12,979		13,086			
		<b>36,767</b>		<b>37,330</b>			
<b>Description</b>	<b>Eligible proportion of primary NOR 2015-16</b>	<b>Pupils as % of total NOR</b>	<b>Eligible proportion of primary NOR 2016-17</b>	<b>Pupils as % of NOR</b>	<b>Change</b>	<b>Change %</b>	
FSM6 % Primary	7,956.05	33%	7,552.30	32%	-403.75	-2%	
IDACI Band 1	890.32	4%	5,787.60	24%	4,897.28	21%	
IDACI Band 2	2,787.09	12%	4,280.63	18%	1,493.54	6%	
IDACI Band 3	8,155.62	34%	6,590.27	28%	-1,565.35	-7%	
IDACI Band 4	5,443.19	23%	1,860.06	8%	-3,583.13	-15%	
IDACI Band 5	3,163.34	13%	458.04	2%	-2,705.30	-11%	
IDACI Band 6	1,326.24	6%	0.00	0%	-1,326.24	-6%	
	<b>Eligible proportion of secondary NOR 2015-16</b>	<b>Pupils as % of total NOR</b>	<b>Eligible proportion of secondary NOR 2016-17</b>	<b>Pupils as % of NOR</b>	<b>Change</b>	<b>Change %</b>	
FSM6 % Secondary	5,537.65	43%	5,534.88	42%	-2.77	0%	
IDACI Band 1	397.95	3%	2,889.77	22%	2,491.82	19%	
IDACI Band 2	1,491.87	11%	2,241.07	17%	749.20	6%	
IDACI Band 3	4,056.81	31%	3,676.69	28%	-380.12	-3%	
IDACI Band 4	2,931.41	23%	1,237.78	9%	-1,693.63	-13%	
IDACI Band 5	2,011.95	16%	334.28	3%	-1,677.67	-13%	
IDACI Band 6	884.73	7%	0.00	0%	-884.73	-7%	

- 5 Officers were confronted with a new balance to be struck between the principles. Seven different models were tested to measure the impact of adjusting formula rates.
- 6 The preferred option struck the best balance between fairness and stability where the greatest number of schools gained most or lost least and where increases or decreases in total NOR were still reflected in total funding.
- 7 There were two exceptions to this: Whitehall and Holy Family where changes to pupil characteristics outweighed total NOR.
- 8 The new factor rates are shown in Table 2 below:

<b>Deprivation Comparator: Funding Rates per pupil</b>					
2015-16			2016-17		
Description	Primary £	Secondary £	Description	Primary £	Secondary £
FSM6 % Primary	600	1,180	FSM6 % Primary	788	1,437
IDACI Band 1	0	0	IDACI Band 1	60	100
IDACI Band 2	0	0	IDACI Band 2	100	150
IDACI Band 3	0	0	IDACI Band 3	200	500
IDACI Band 4	200	400	IDACI Band 4	200	500
IDACI Band 5	500	1,000	IDACI Band 5	200	500
IDACI Band 6	750	1,500	IDACI Band 6	0	0

- 9 There was a further adjustment to the primary AWPU of £10.50 raising it to £3,450.50.
- 10 The new rates change the distribution of deprivation funding from roughly 60% FSM6: 40% IDACI to 70% FSM6: 30% IDACI.
- 10 Appendix E2 details the changes in the LFF distribution.
- 11 The change in IDACI distribution and its impact on funding will be addressed in the Schools Block Review group and further discussions will take place with Heads' groups.



Secondary	NOR	AWPU	FSM6	IDACI 1	IDACI 2	IDACI 3	IDACI 4	IDACI 5	IDACI 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	£1,180				£400	£1,000	£1,500	£800	£600	£1,000	£125,000					
<b>Maintained</b>																		
<b>All-through:</b>																		
4000 Buxton	6	£52,360	£111,886	£9,189	£34,533	£107,701	£20,261	£218,524	£61,084	£22,056	£2,444	£61,395	£61,899	£7,428	£17,645	£0	£139,666	
4062 George Mitchell	-51	£242,760	£46,030	£15,900	£12,600	£38,000	£24,200	£83,000	£132,000	£13,498	£22,208	£800	£46,892	£20,633	£35,405	£0	£253,006	
<b>TOTAL</b>	<b>-45</b>	<b>£190,400</b>	<b>£157,916</b>	<b>£25,089</b>	<b>£47,133</b>	<b>£145,701</b>	<b>£3,939</b>	<b>£301,524</b>	<b>£193,084</b>	<b>£35,555</b>	<b>£24,652</b>	<b>£62,195</b>	<b>£108,791</b>	<b>£28,061</b>	<b>£53,050</b>	<b>£0</b>	<b>£113,340</b>	
4060 Frederick Bremer	-8	£38,080	£121,763	£29,737	£16,140	£121,295	£48,149	£116,238	£97,080	£3,906	£10,467	£0	£0	£40,000	£5,611	£8,178	£36,614	
4063 Heathcote	-14	£66,640	£63,884	£10,234	£21,846	£185,491	£62,981	£141,735	£82,959	£671	£9,659	£0	£0	£0	£2,313	£11,239	£68,297	
4064 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	
4066 Willowfield	63	£299,880	£104,689	£16,345	£16,847	£122,340	£78,446	£70,219	£30,092	£7,267	£2,184	£0	£0	£0	£1,811	£0	£378,073	
4069 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	
4072 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	
4075 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	£465	£0	£20,582	
4076 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	£14,849	£98,972	
4603 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	
<b>TOTAL</b>	<b>51</b>	<b>£242,760</b>	<b>£733,740</b>	<b>£177,691</b>	<b>£187,977</b>	<b>£1,052,508</b>	<b>£392,724</b>	<b>£1,083,591</b>	<b>£668,983</b>	<b>£20,151</b>	<b>£68,162</b>	<b>£40,300</b>	<b>£0</b>	<b>£40,000</b>	<b>£7,447</b>	<b>£34,266</b>	<b>£202,477</b>	
<b>Academies:</b>																		
4001 Rushcroft	-45	£214,200	£6,038	£13,323	£12,772	£104,178	£45,883	£68,240	£81,258	£21,696	£22,093	£177,000	£0	£0	£578	£0	£139,482	
4061 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	£278	£0	£35,423	
5400 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	
5401 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	
4002 Eden Girls'	100	£198,349	£97,872	£5,422	£9,337	£38,151	£913	£51,958	£20,756	£6,799	£3,877	£0	£0	£0	£14,818	£0	£302,824	
6905 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	
<b>TOTAL</b>	<b>96</b>	<b>£179,309</b>	<b>£512,398</b>	<b>£86,197</b>	<b>£101,051</b>	<b>£640,134</b>	<b>£169,646</b>	<b>£474,659</b>	<b>£470,788</b>	<b>£7,802</b>	<b>£49,964</b>	<b>£177,000</b>	<b>£0</b>	<b>£0</b>	<b>£17,406</b>	<b>£0</b>	<b>£540,637</b>	
	<b>102</b>	<b>£231,669</b>	<b>£1,404,054</b>	<b>£288,977</b>	<b>£336,161</b>	<b>£1,838,343</b>	<b>£558,431</b>	<b>£1,859,773</b>	<b>£1,332,855</b>	<b>£63,508</b>	<b>£142,779</b>	<b>£198,895</b>	<b>£108,791</b>	<b>£68,061</b>	<b>£77,904</b>	<b>£34,266</b>	<b>£629,774</b>	