

## LONDON BOROUGH OF WALTHAM FOREST

Meeting / Date	<b>SCHOOLS FORUM</b> <b>16 September 2015</b>	Agenda Item	<b>7</b>
Report Title	<b>Report of the Schools Block Task and Finish Group</b>		
Decision/ Discussion/ Information	For Discussion and Decision		
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Appendices	Appendix A: House of Commons: Written Statement (HCWS135) Appendix B: Pack for 1 July meeting Appendix C: Pack for 8 July meeting		

### 1 SUMMARY

- 1.1 In June, the 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.
- 2.2 This report presents the recommendations of the group on the local funding formula (LFF). There is a separate report on the Growth Fund on the agenda.

### 2 RECOMMENDATIONS

- 2.1 Schools Forum adopts the following principles to be applied to funding decisions:
- Transparency
  - Fairness
  - Stability
  - Support for vulnerable students

**All Members may vote on Recommendation 2.1**

- 2.2 Schools Forum makes the following recommendations to the local authority when it sets the Schools Block budgets for 2016-17. That:
- 2.2.1 The factors used in the local funding formula are not changed.
  - 2.2.2 The proportion of funding allocated to deprivation should remain the same in each phase.
  - 2.2.3 The rates applied to deprivation factors should be changed when necessary to maintain the proportion of funding allocated to deprivation.
  - 2.2.4 The rates applied to the factors other than deprivation factors are not changed.
  - 2.2.5 The primary to secondary ratio is not changed.
  - 2.2.6 The cap and 100% scale method to fund MFG is not changed.
  - 2.2.7 AWPU is adjusted to balance resources following any changes to rates.

**Schools members, academies members and PVI representatives may vote on Recommendations 2.2.1 to 2.2.7.**

### **3 REASON**

- 3.1 The Local Authority (LA) proposes and decides on Local Funding Formula (LFF) changes, but Schools Forum must be consulted and governing bodies must be informed of all consultations.
- 3.2 For 2016-17 the LA is not proposing changes to the LFF. This report presents recommendations from the Schools Block Task and Finish Group.

### **4 BACKGROUND**

- 4.1 The LA believes the current LFF is reasonably fair in reflecting need and that the majority of schools, especially primary schools, have coped so far with their allocations.
- 4.2 There may be significant other changes to schools funding in the future. Although the government has reaffirmed its commitment to protect per pupil funding, this is on a national level and there may be a new national distribution, with less funding for London. Changes to the School Finance Regulations may follow the Spending Review as is clear from the House of Commons written statement of 16 July 2015. See **Appendix A**.
- 4.2 It is not mandatory to change the primary to secondary ratio. The operational guide states "For 2015 to 2016, the average ratio across all local authorities is

1: 1.28. It is not expected that local authorities must conform to this, however they should be aware of where they are within the range”.

- 4.3 Waltham Forest’s primary : secondary ratio is 1:1.38. The average for London and statistical neighbours is 1: 1.31, and for England 1: 1.30. Waltham Forest is ranked 4<sup>th</sup> highest in London; the highest compared to statistical neighbours; and the 14<sup>th</sup> highest in England.
- 4.4 There is (anecdotal) evidence that secondary schools are coping less well with their allocations and accumulating large deficits in other London LAs where the ratio is lower.
- 4.5 The Schools Block Task and Finish Group met on 1, 8 and 15 July to consider the existing funding formula and whether any changes should be made. Five questions were asked:
- Q1: Should we change the factors used?
  - Q2: Should we change the rates applied to the factors?
  - Q3: Should we change the primary: secondary ratio?
  - Q4: Should we continue with the existing cap and scale to fund the  
Minimum Funding Guarantee (MFG)?
  - Q5: Do you want to model any changes?
- 4.3 **Appendix B** is the initial pack presented to the group, which includes how the Waltham Forest LFF allocates the Schools Block by each factor and the characteristics of our students compared to London and our statistical neighbours.
- 4.4 **Appendix C** is the follow-up pack, including the pupil-led formula allocation for each school in 2015-16, with and without pupil premium.
- 4.5 The operation of the LFF was tested by requesting officers to model the impact of increases to the Lump Sum paid for by reducing the Basic Allocation from the Age Weighted Pupil Unit (AWPU) and the impact of reducing deprivation funding by removing the factor for IDACI 6 and increasing AWPU.
- 4.6 The group tested the basic fairness of the LFF concluding that the variations in per pupil income were not disproportionate to the level of need and that the proportion of funding allocated by pupil characteristics followed the incidence of those characteristics reasonably. The group felt that it was important to maintain the relative value of the deprivation “pot” in each phase: for example, suggesting that if the funding allocated by Free School Meals fell, the rates applied to the IDACI factors should be raised.

- 4.7 The group considered the funding of the MFG. In Waltham Forest, we fund the MFG entirely from capping schools that are gaining funding, using a 100% claw back (scale) above the cap. In 2015-16 no school lost more than 1.5% in per pupil funding and no school gained more than 2.45%. In some other LAs, the gains are not entirely capped, so schools gain a proportion of funding above the cap (for example a 50% scale). The group concluded that our method of funding the “floor” of MFG by a “ceiling” on gains promoted institutional stability.

## **6 CONSULTATION**

- 6.1 The Schools Block Task and Finish Group is the initial phase of any consultation on the LFF.
- 6.2 Should the LA or Schools Forum propose changes to the Formula then a wider consultation of schools will take place during September and October. The results of the consultation and the LA’s responses will be reported back to November Schools Forum and consultative votes taken on the LA’s responses.

# House of Commons: Written Statement (HCWS135)

## Department for Education

Written Statement made by: **Parliamentary Under Secretary of State for Childcare and Education (Mr Sam Gyimah)** on 16 Jul 2015.

### School funding in 2016-17

World class schools are a vital part of the Government's long term economic plan, and are one of the key drivers of the productive economy of the future.

We are therefore committed to making school funding fairer, to maintaining the amount of money that follows children into schools and to confirming the extra £390m fairer funding uplift from 2015-16 in budgets for 2016-17 and beyond. This will help every child, everywhere, to have the best possible chance to reach their potential.

Today we are taking the first steps towards meeting these commitments by publishing the per pupil funding rates for each Local Authority's schools budget for 2016-17. This protects the per pupil funding in each authority from 2015-16, meeting the commitment to protect the national schools budget and to base-lining the £390m extra funding.

We are also publishing the Education Funding Agency's Operational Guide; to allow Local Authorities to start the process of consulting with their schools on how the funding should be distributed in their area.

The forthcoming Spending Review will set out the Government's plans for the delivery and funding of public services for this Parliament. It will set out further detail on key delivery priorities for schools and Local Authorities and confirm funding levels for other grants and programmes. In light of the Spending Review and any consequent changes to the School Finance Regulations (which would of course be consulted on), the Operational Guide may have to be updated and Local Authorities may have to review the planning and modelling they have undertaken.

Final funding allocations to each authority will be made in December, in line with the latest data on their pupil numbers.

Base-lining the 2015-16 Minimum Funding Levels in 2016-17 is an important step towards making funding fairer. However it remains the case that a school in one part of the country can receive over 50% more funding than an identical school in another part of the country.

I am therefore committed to making schools and early education funding fairer and will put forward proposals in due course.

We recognise the links between funding for early education, schools and pupils with high cost special educational needs. These are complex issues to consider, and we will consult extensively with the sector and the public on them.

Waltham Forest Council

# Schools Block Task & Finish Group 2016-17 July 2015



## Five Questions

Q1: Should we change the factors used?

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

Q3: Should we change the primary: secondary ratio?

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

Q5: Do you want us to model any changes?

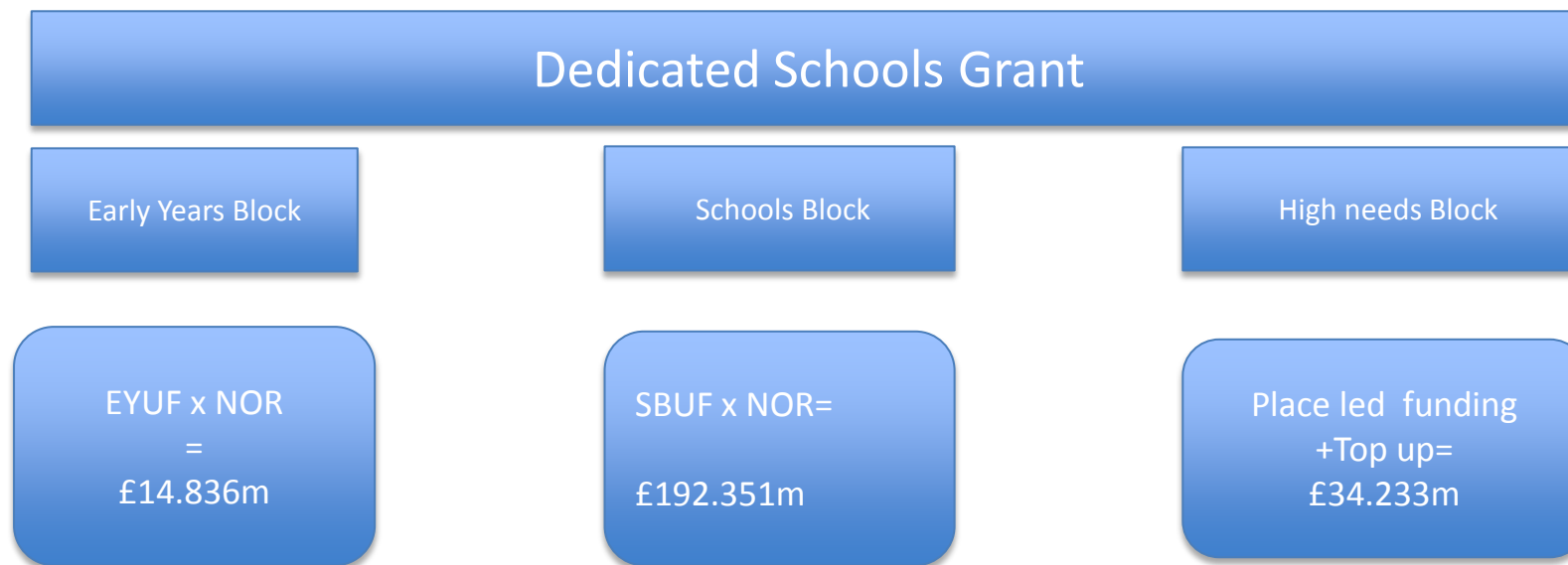
# Contents

- Funding flows
- Waltham Forest factors
- Comparisons with London and Neighbours for each factor



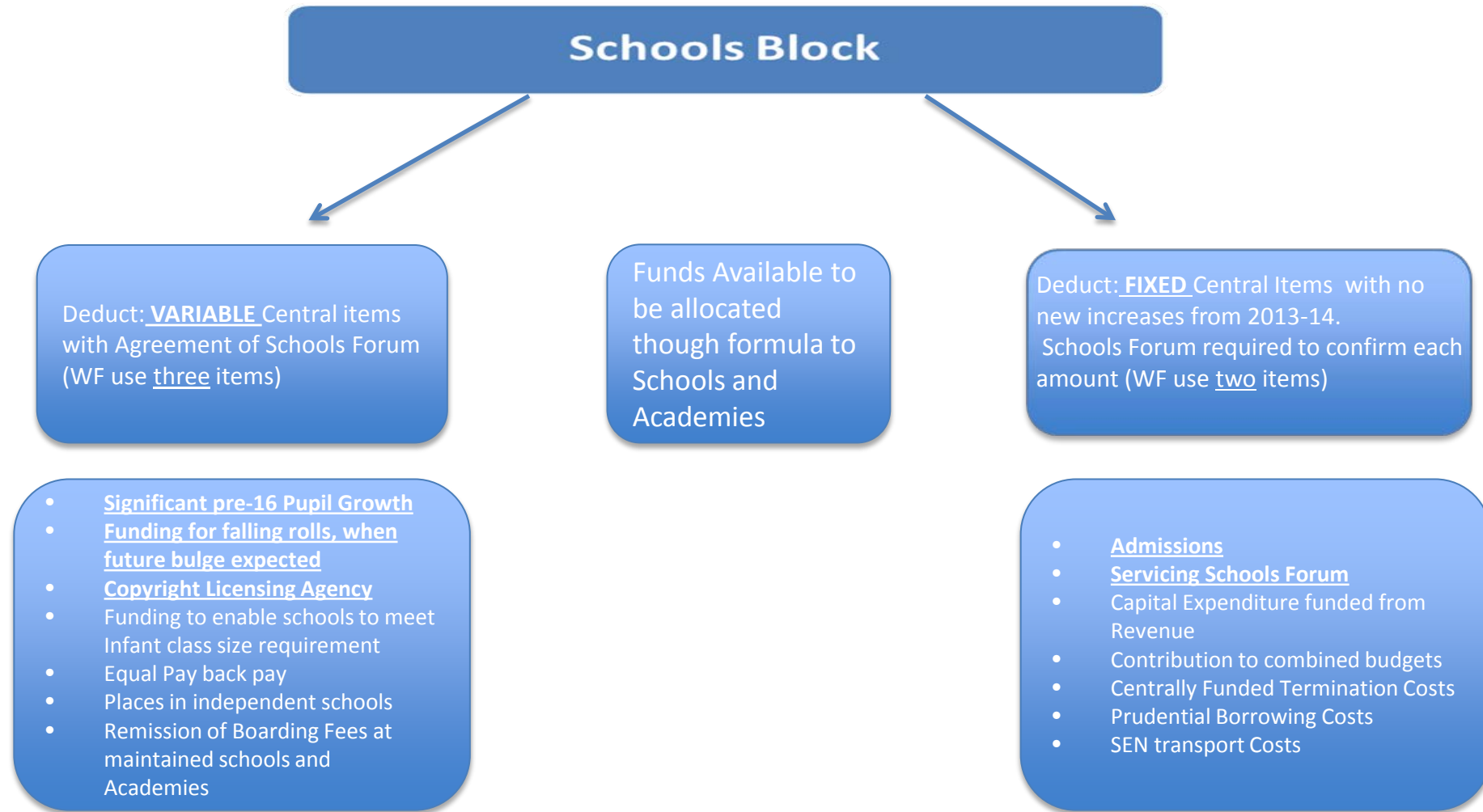
# Funding of Schools

## Department for Education

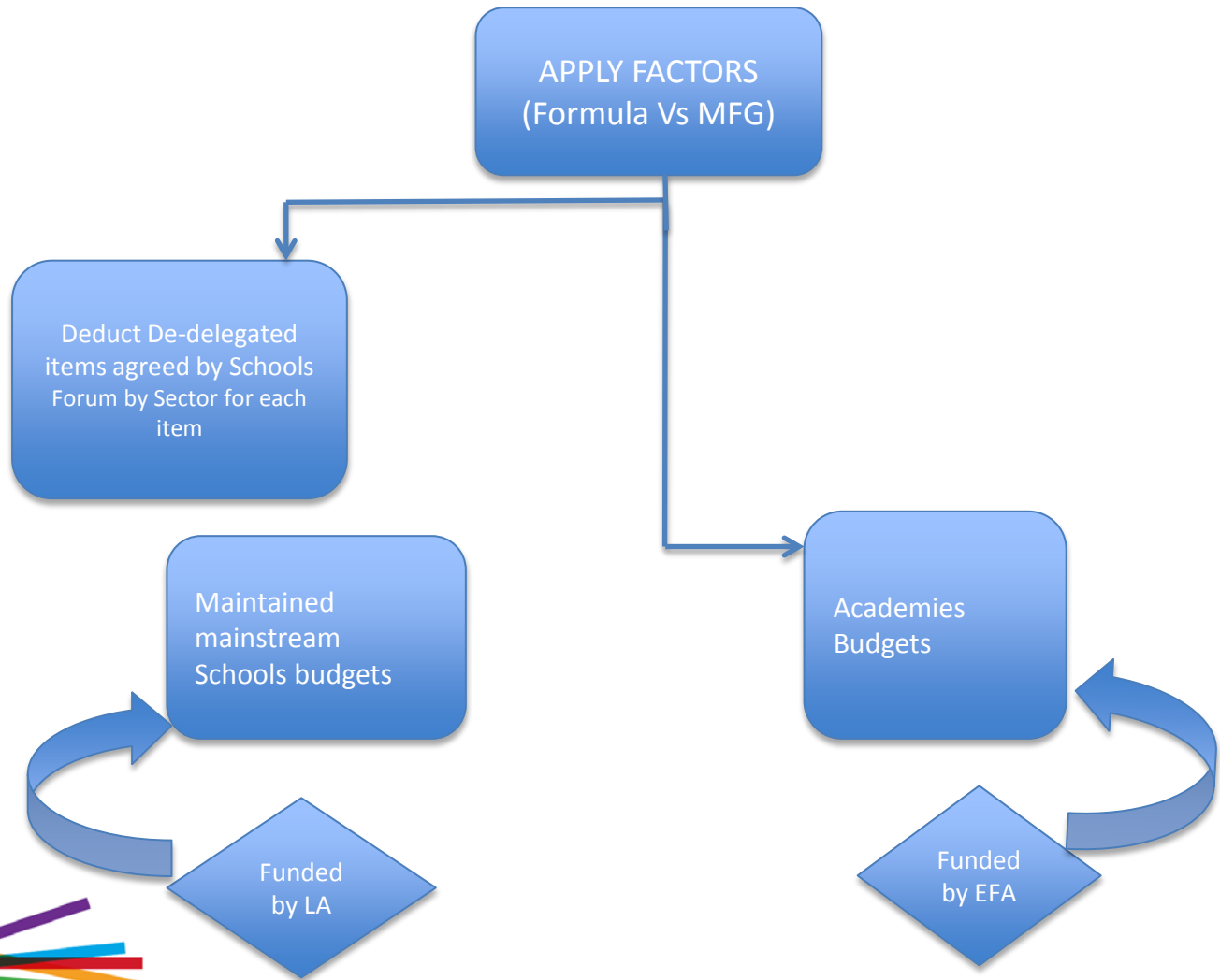


- Formula Driven

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



## Schools Block Factors -5 to 16 Year Olds

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

Schools Block Distribution

	Primary £	Secondary £	Total £	% of All Block	London	Neighbours
<b>Basic Entitlement</b>	<b>81,890,920</b>	<b>62,057,691</b>	<b>143,948,611</b>	<b>75.98%</b>	<b>75.87%</b>	<b>74.36%</b>
			-			
FSM	4,776,996	6,549,564	11,326,560	5.98%	5.95%	6.96%
IDACI	3,667,641	4,537,092	8,204,733	4.33%	3.17%	4.17%
<b>Deprivation</b>	<b>8,444,637</b>	<b>11,086,656</b>	<b>19,531,293</b>	<b>10.31%</b>	<b>9.12%</b>	<b>11.12%</b>
			-			
LAC	-	-	-	0.00%	0.05%	0.07%
EAL	6,303,364	821,674	7,125,038	3.76%	1.97%	2.10%
Mobility	453,639	100,800	554,439	0.29%	0.20%	0.19%
Prior attainment	2,970,077	2,075,319	5,045,396	2.66%	4.56%	4.17%
<b>Additional Needs</b>	<b>9,727,080</b>	<b>2,997,793</b>	<b>12,724,873</b>	<b>6.72%</b>	<b>6.78%</b>	<b>6.51%</b>
<b>SubTotal Pupil-Led (Must be at least 80%)</b>	<b>100,062,637</b>	<b>76,142,140</b>	<b>176,204,777</b>	<b>93.00%</b>	<b>91.78%</b>	<b>92.00%</b>
Lump sum	4,608,791	2,016,209	6,625,000	3.50%	5.94%	5.66%
Split sites	243,061	501,939	745,000	0.39%	0.13%	0.20%
Rates	1,516,285	1,667,292	3,183,577	1.68%	1.24%	1.16%
PFI	1,427,902	1,275,131	2,703,033	1.43%	0.22%	0.26%
<b>Site Specific</b>	<b>7,796,039</b>	<b>5,460,571</b>	<b>13,256,610</b>	<b>7.00%</b>	<b>7.53%</b>	<b>7.28%</b>
Sixth Form	-	-	-	0.00%	0.08%	0.18%
Exceptional Circumstances	-	-	-	0.00%	0.02%	0.03%
Minimum Funding Guarantee	-	-	-	0.00%	0.60%	0.52%
Balance					-0.01%	
<b>TOTAL</b>	<b>107,858,676</b>	<b>81,602,711</b>	<b>189,461,387</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>

### Use of Factors: London

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

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

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

### Use of Factors: Neighbours

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

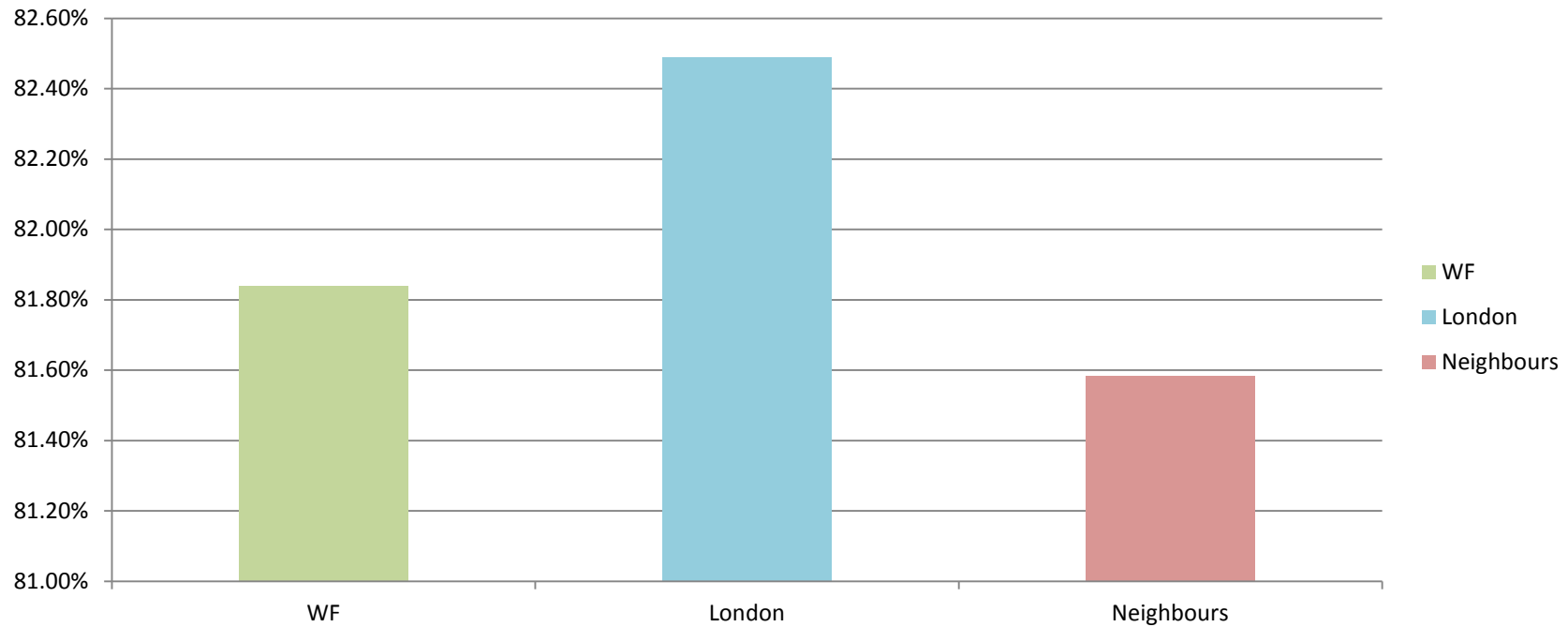
√	Use	8	6	6	6	9	9	9	8	10	9	10
X	Do not use	2	4	4	4	1	1	1	2	0	1	0

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

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

Waltham Forest Council

### Primary AWPUs funding

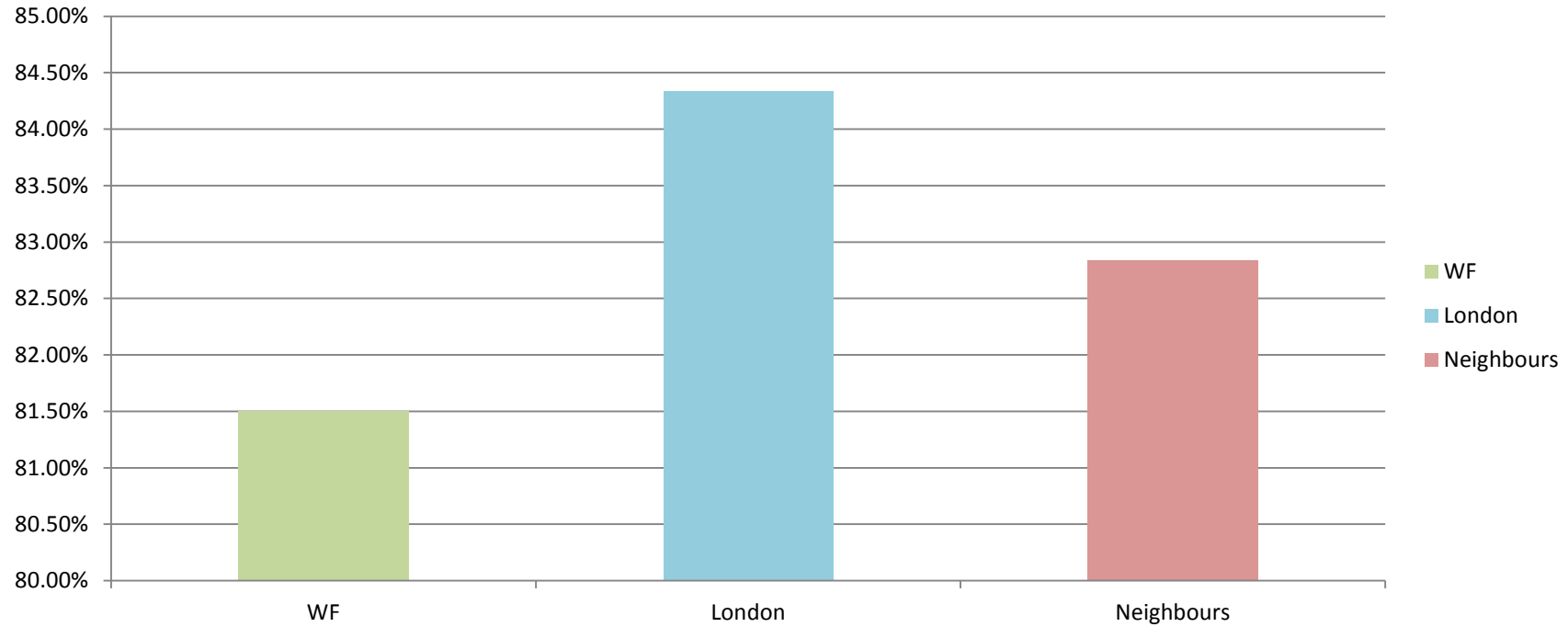


WF	London	Rank in London	Neighbours	Rank in Neighbours
81.84%	82.49%	20/32	81.58%	4/10



Waltham Forest Council

### Secondary AWPUs funding



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

Waltham Forest Council

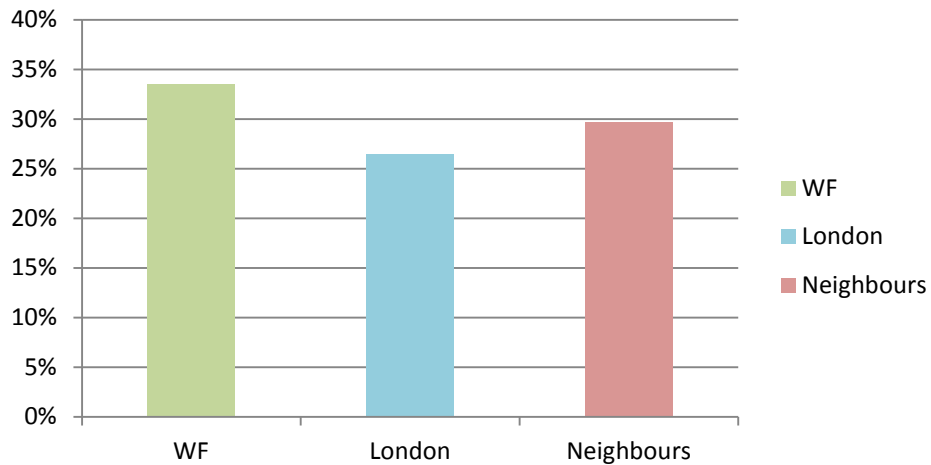
Deprivation: Free School Meals

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

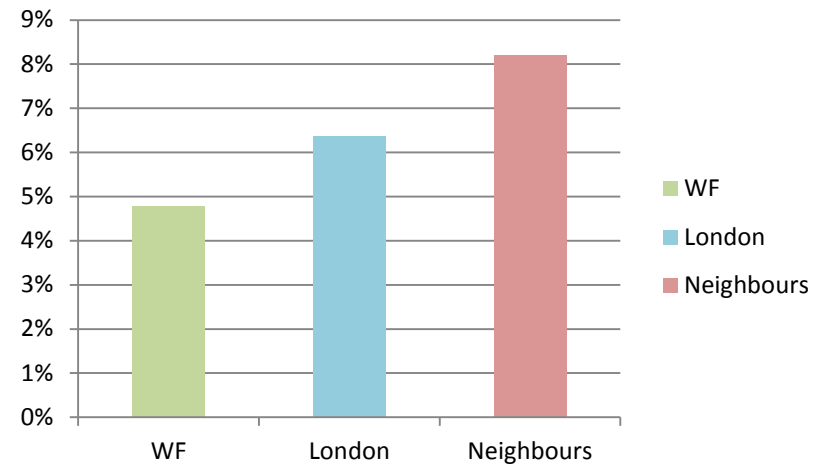
Above London average FSM pupils.  
Below London average FSM funding

Above Neighbour average FSM pupils.  
Below Neighbour average FSM funding

Primary FSM pupils



Primary FSM Funding



Waltham Forest Council

Secondary

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

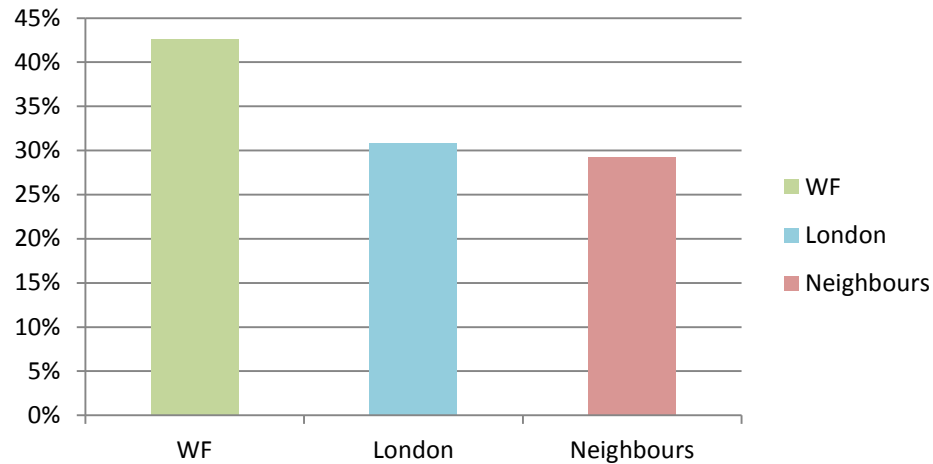
*Above London average FSM pupils.*

*Above London average FSM funding.*

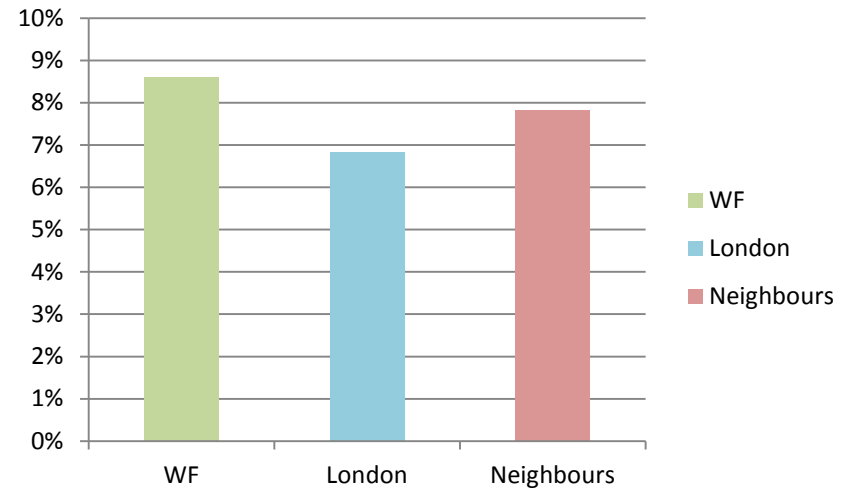
*Above Neighbour average FSM pupils*

*Above Neighbour average FSM funding.*

Secondary FSM pupils



Secondary FSM Funding



Waltham Forest Council

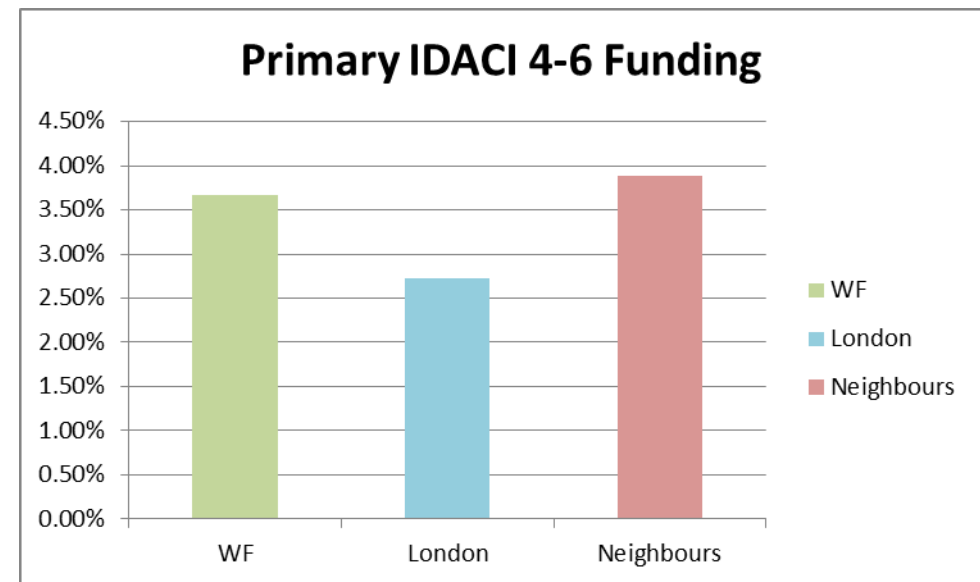
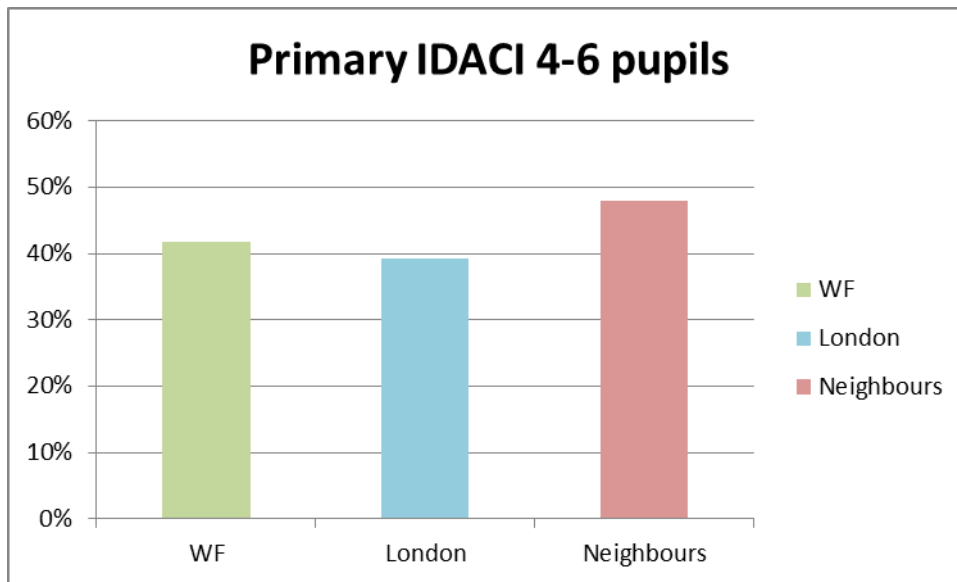
Deprivation: IDACI 4-6

Primary

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

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

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



Waltham Forest Council

Deprivation: IDACI 4-6

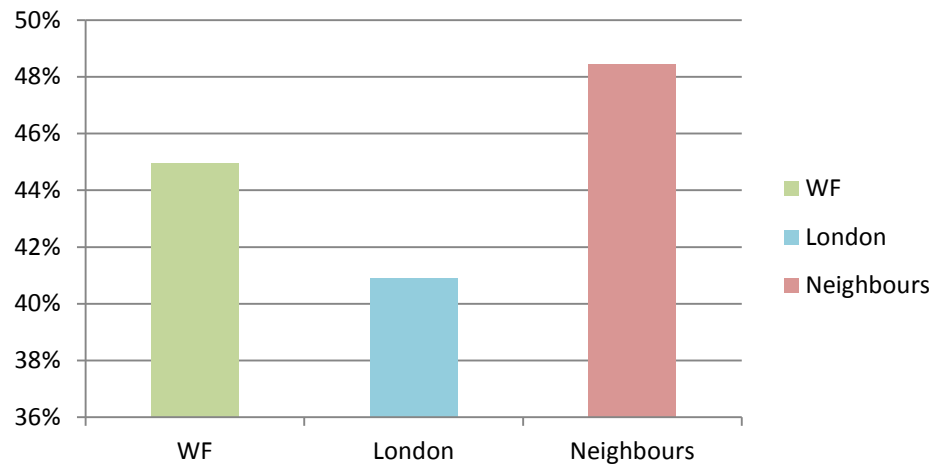
Secondary

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

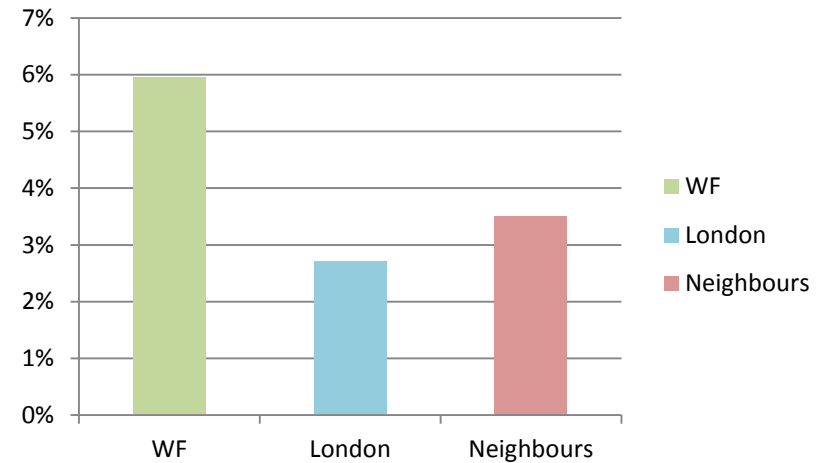
Above London average IDACI 4-6 pupils  
Above London average IDACI 4-6 funding

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

Secondary IDACI 4-6 pupils



Secondary IDACI 4-6 Funding



Waltham Forest Council

Additional Needs - EAL

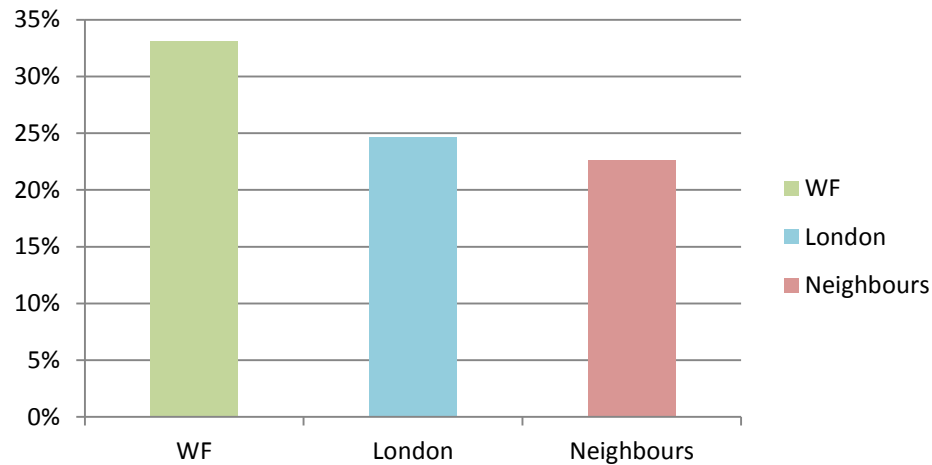
Primary

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

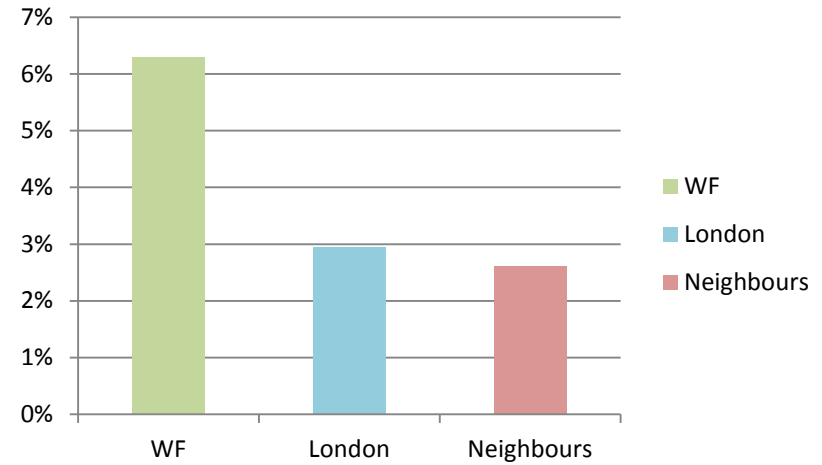
*Above London average EAL pupils  
Above London average EAL funding*

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

Primary EAL pupils



Primary EAL 3 Funding



Waltham Forest Council

Additional Needs - EAL

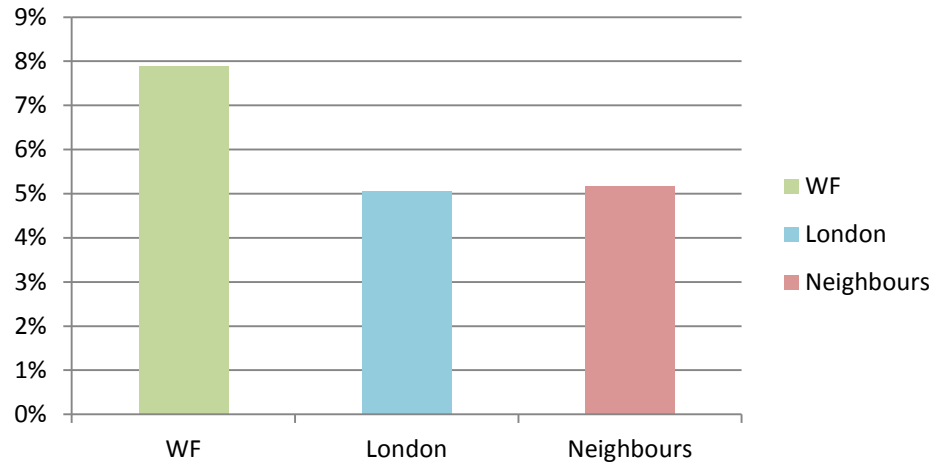
Secondary

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

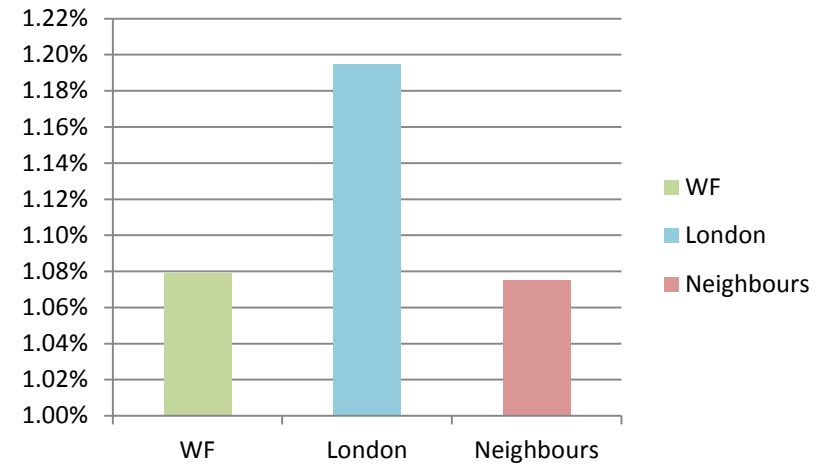
Above London average EAL pupils.  
Below London average EAL funding.

Above Neighbour average EAL pupils  
Above Neighbour average EAL funding.

Secondary EAL pupils



Secondary EAL 3 Funding



Waltham Forest Council

Additional Needs - Mobility

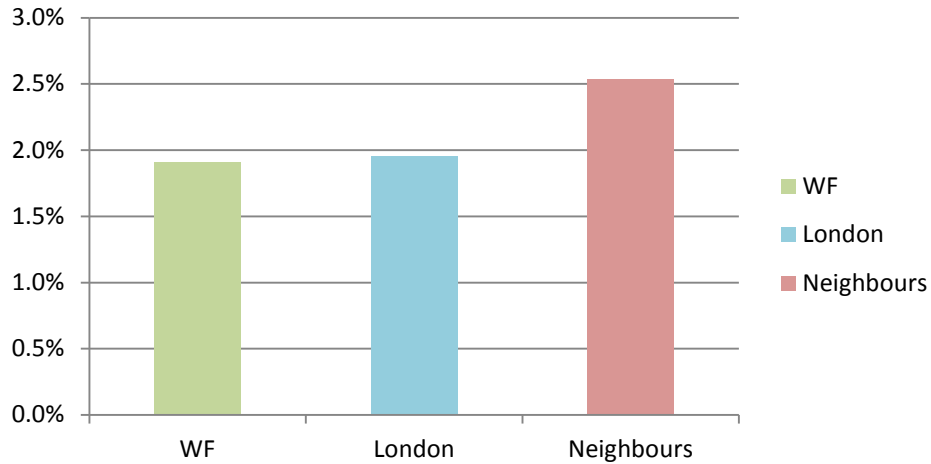
Primary

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

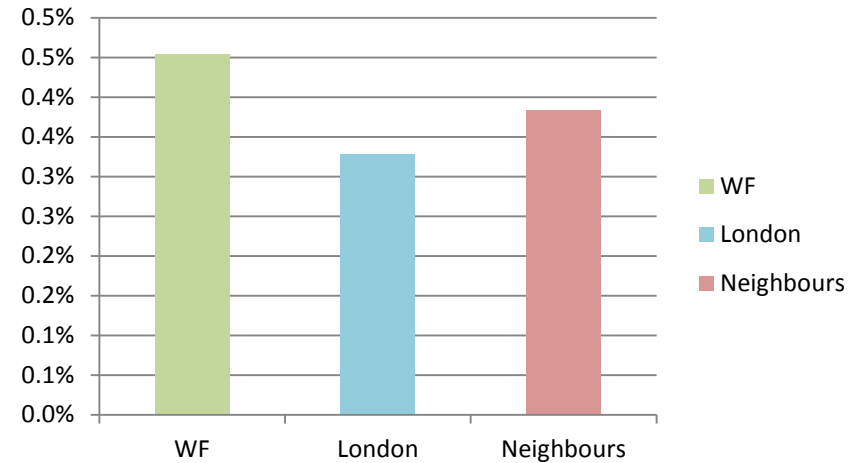
*Below London average Mobility pupils.  
Above London average Mobility funding*

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

Primary Mobility pupils



Primary Mobility Funding





Waltham Forest Council

Additional Needs - Mobility

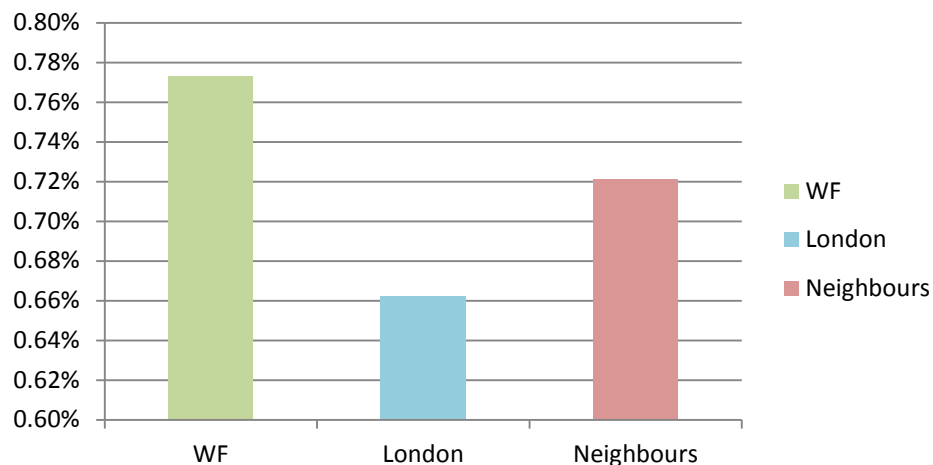
Secondary

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

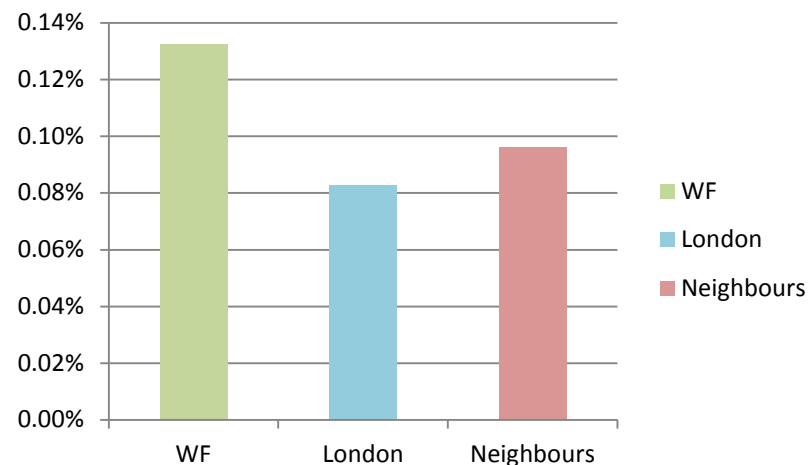
*Above London average Mobility pupils.  
Above London average Mobility funding*

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

Secondary Mobility pupils



Secondary Mobility Funding



Waltham Forest Council

Additional Needs - Prior Attainment

Primary

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

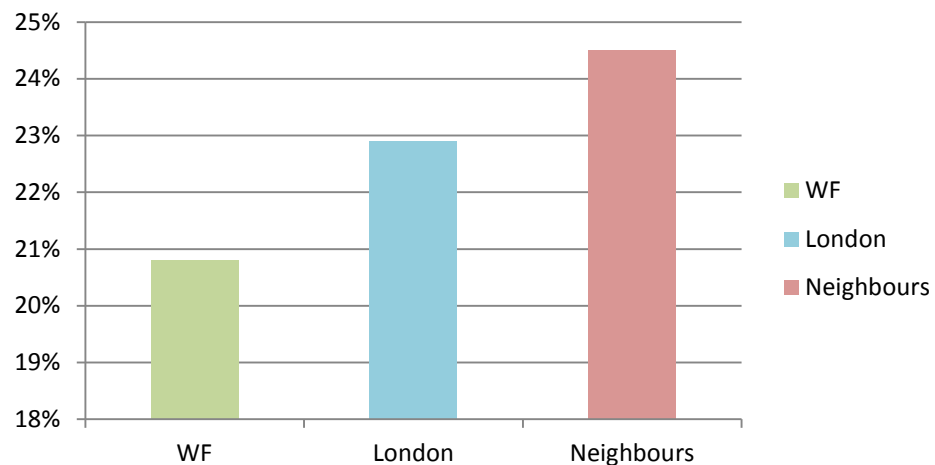
*Below London average Prior Attainment pupils.*

*Below London average Prior Attainment funding*

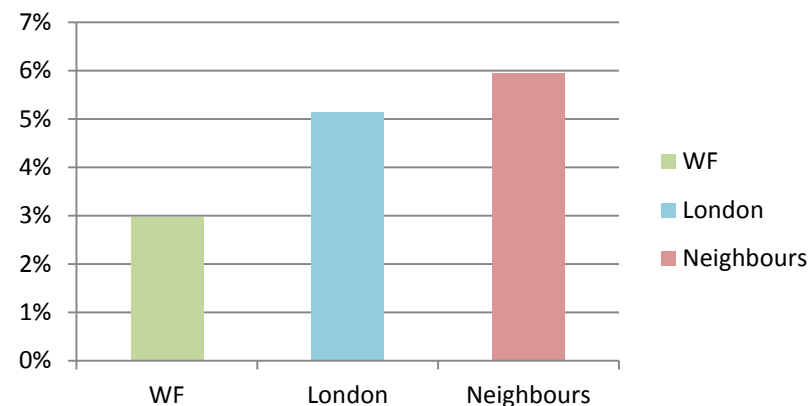
*Below Neighbour average Prior Attainment pupils*

*Below Neighbour average Prior Attainment funding*

Primary Prior attainment pupils



Primary Prior attainment Funding



Waltham Forest Council

Additional Needs - Prior Attainment

Secondary

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

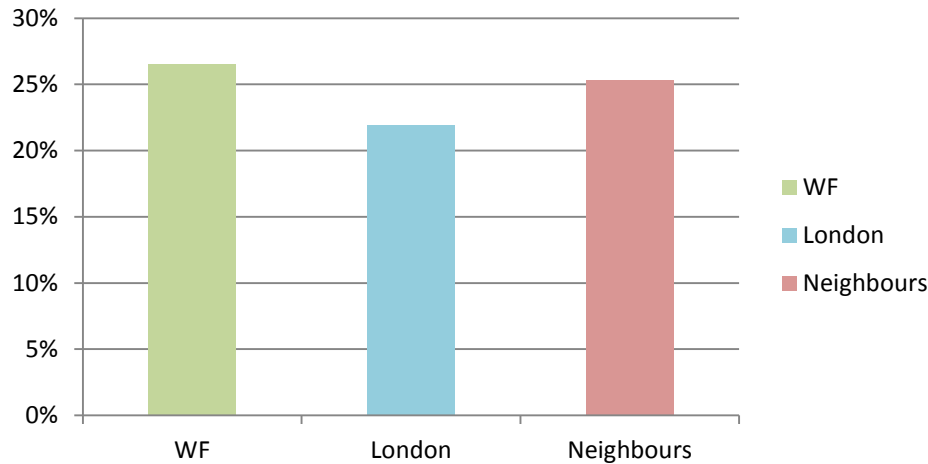
*Above London average Prior Attainment pupils*

*Below London average Prior Attainment funding*

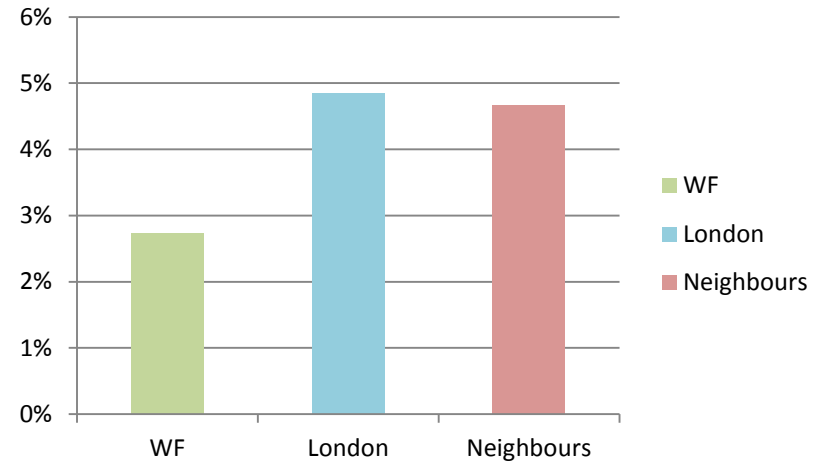
*Above Neighbour average Prior Attainment pupils*

*Below Neighbour average Prior Attainment funding*

Secondary Prior attainment pupils



Sec. Prior attainment Funding



Waltham Forest Council

**LUMP SUM**

**Context**

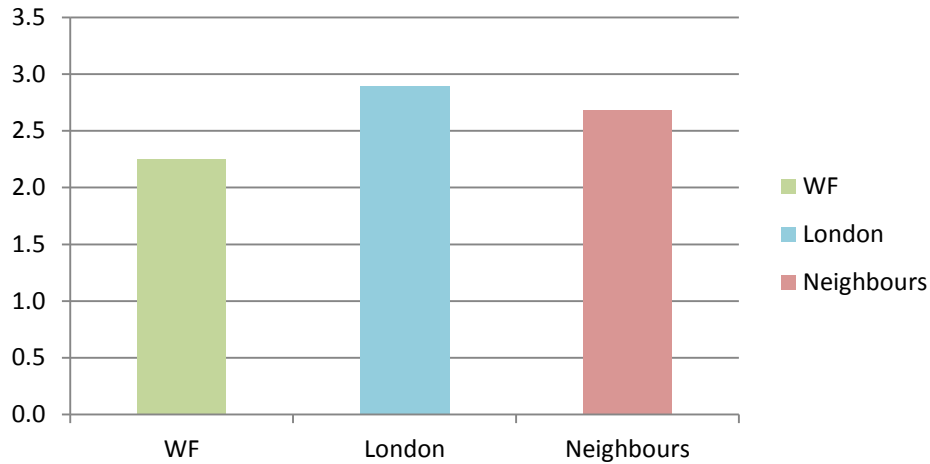
	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary schools per 1000 pupils	2.25	2.89	29/32	2.69	10/10
Primary schools per 1000 places	1.98	2.64	30/32	2.46	10/10

Primaries are larger:

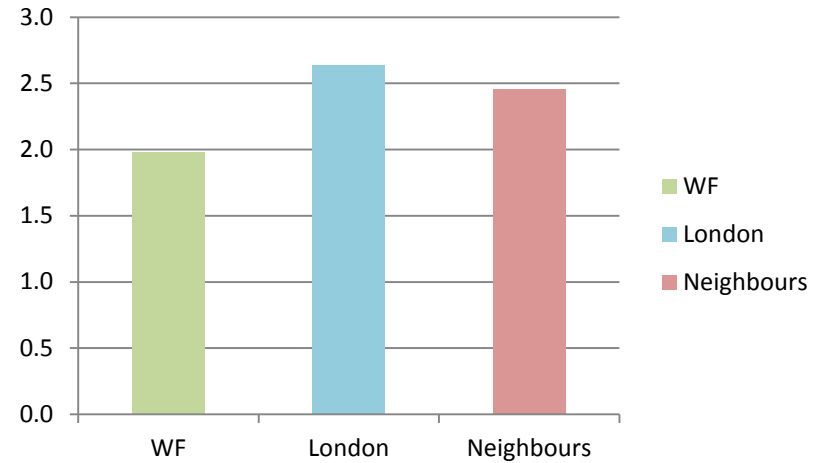
Below London average for school per 1000

Below Neighbour average for schools /1000

**Primary schools per 1000 pupils**



**Primary schools per 1000 places**



Waltham Forest Council

**LUMP SUM**

**Context**

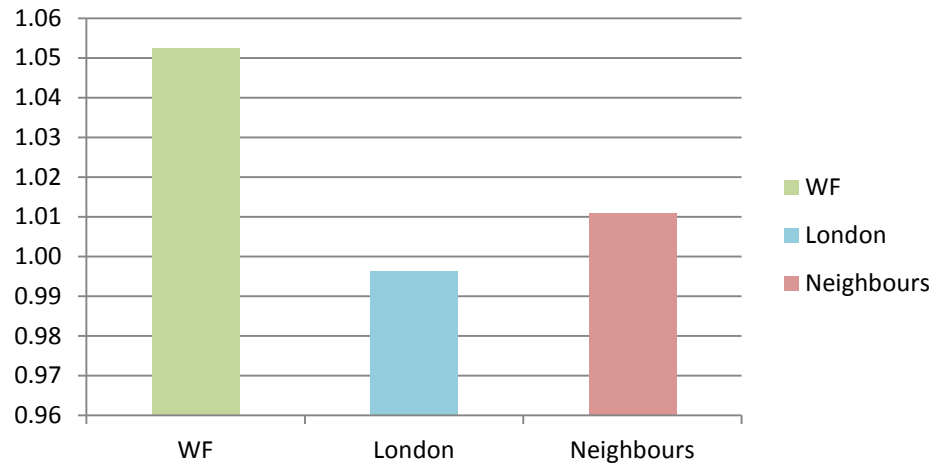
	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Secondary schools per 1000 pupils	1.05	1.00	11/32	1.01	4/10
Secondary schools per 1000 places	0.98	0.86	8/32	0.87	3/10

Secondaries are smaller:

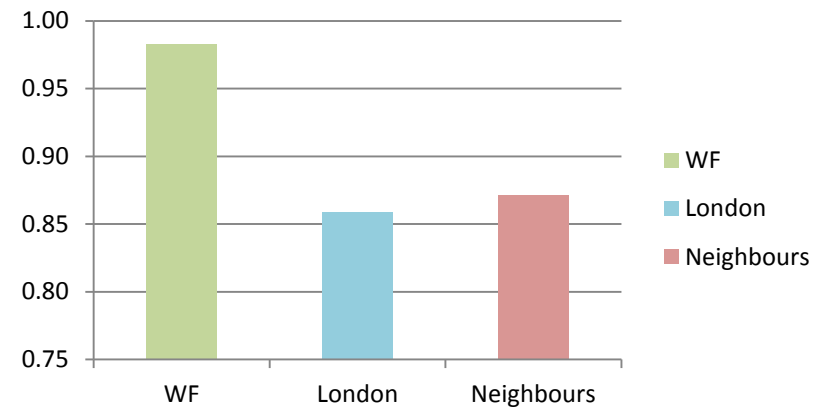
Above London average for school per 1000

Above Neighbour average for schools per 1000

**Secondary schools per 1000 pupils**

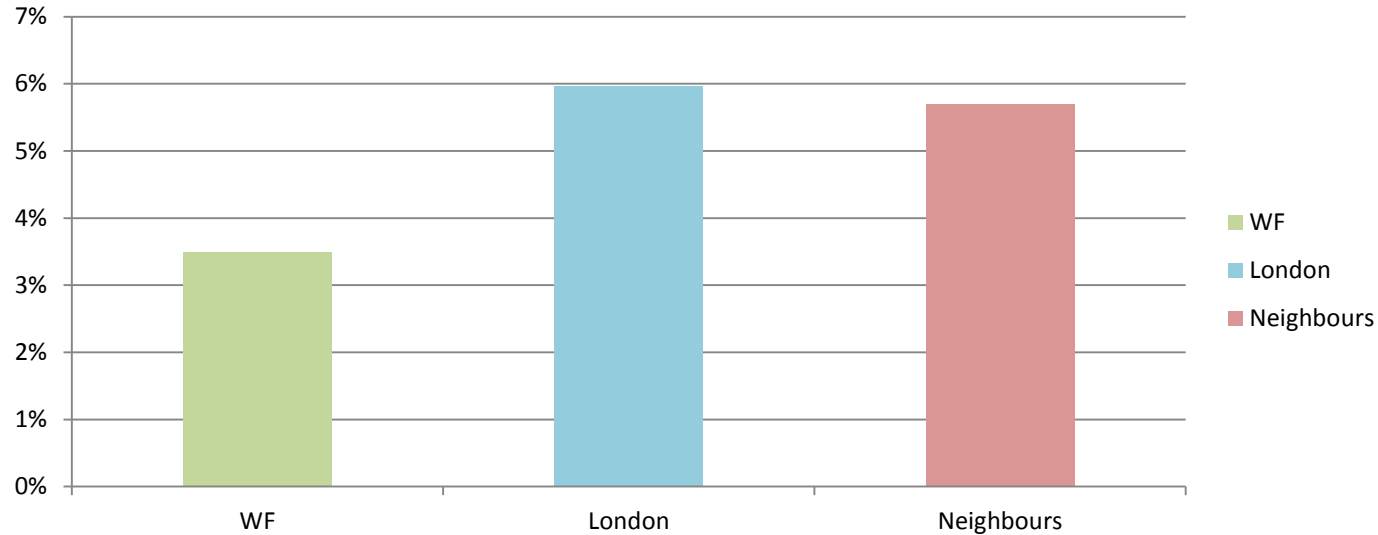


**Secondary schools per 1000 places**



Waltham Forest Council

### Lump sum Proportion



### LUMP SUM - Comparisons

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

Lump Sum as proportion of funding:  
 Secondary Lump Sum amount:  
 Primary Lump Sum amount:

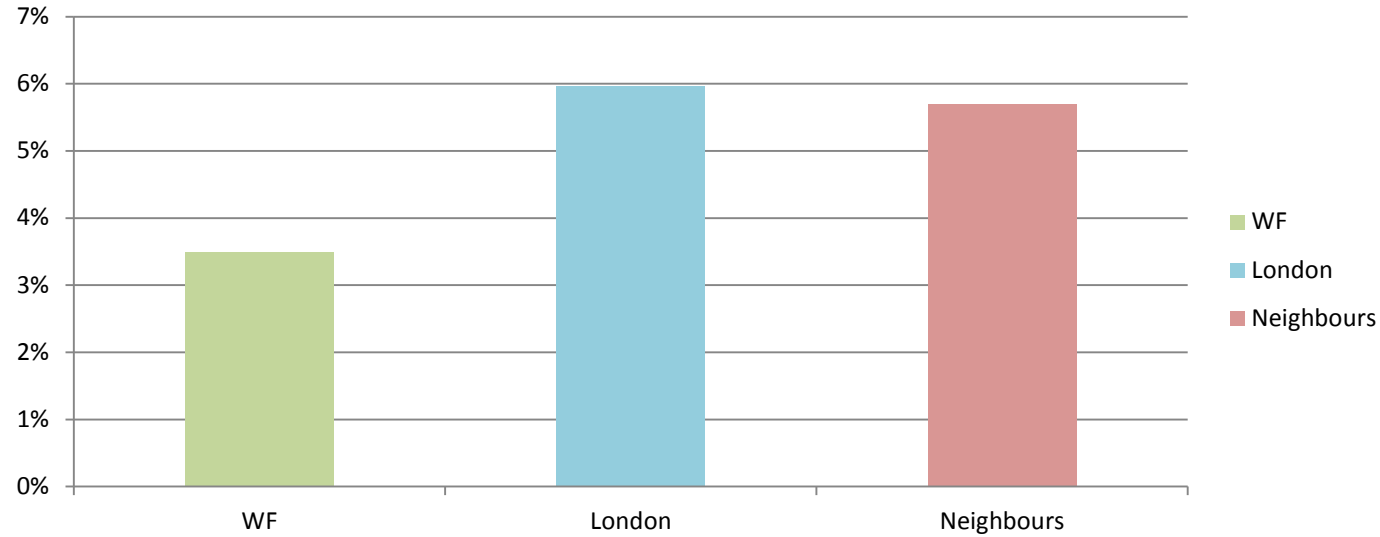
*Below London average*  
*Below London average*  
*Below London average*

*Below Neighbour average*  
*Below Neighbour average*  
*Below Neighbour average*



Waltham Forest Council

### Lump Sum Proportion

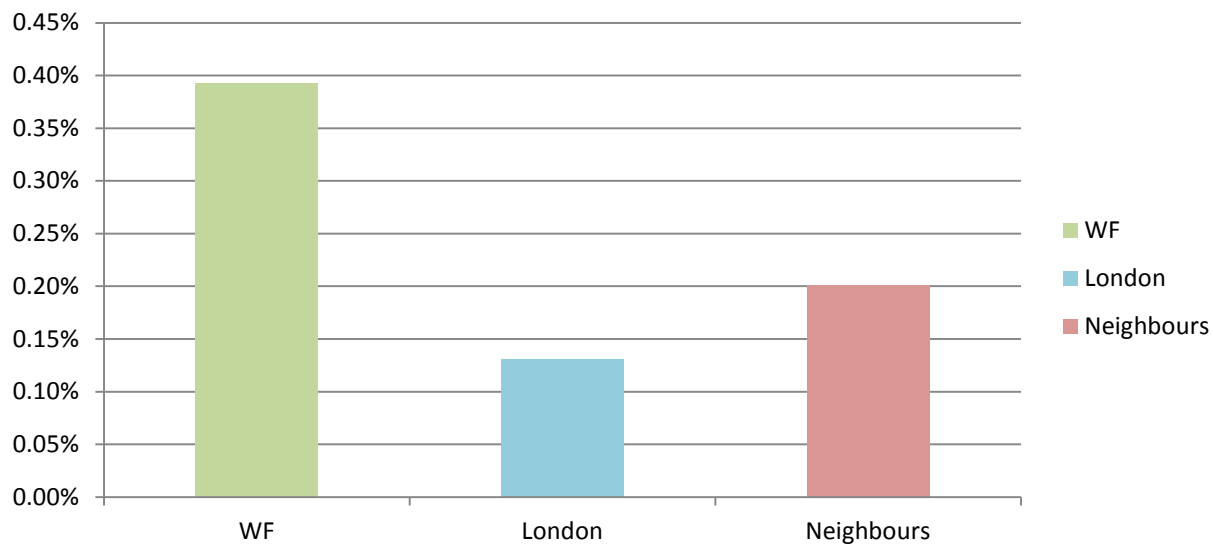


	WF	London	WF rank in London	Neighbours	WF Rank in Neighbours
Primary : Secondary difference?	-£35,000		32/32		9/10
Fund Primaries less		4		2	
Fund Primaries the same		25		7	
Fund Primaries more		3		3	

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

Waltham Forest Council

### Split Sites Proportion



#### SPLIT SITES

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

*Higher in total and proportion than London average*

*Higher in total and proportion than Neighbour average*





**Primary: Secondary Ratio**

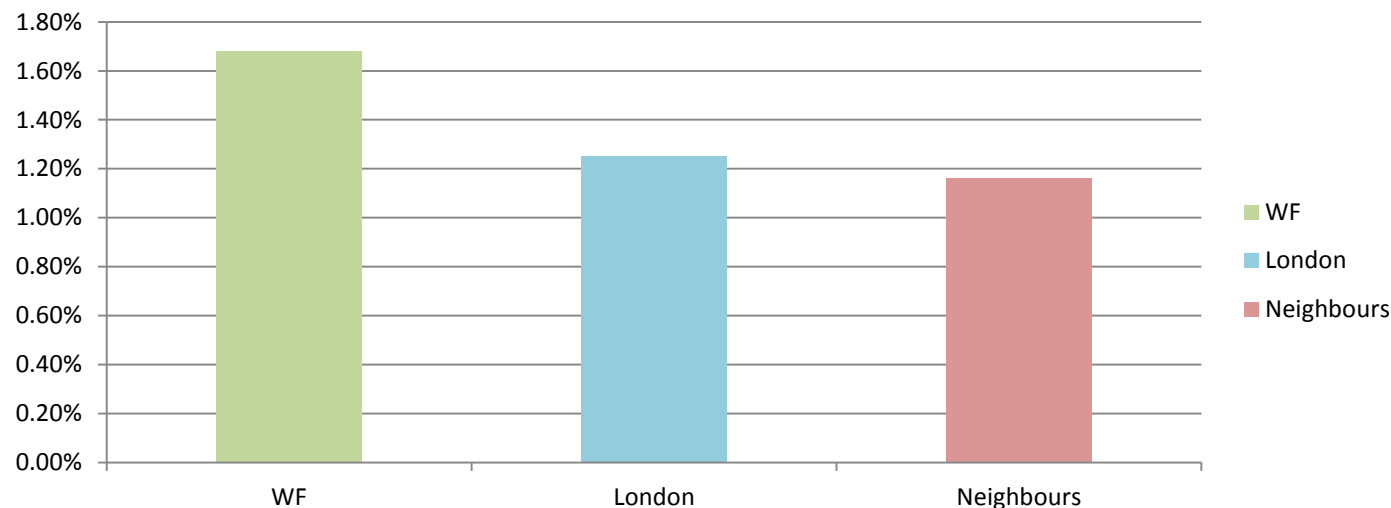
	WF	London	Neighbours	England
Ratio	1.38	1.31	1.31	1.30
WF Rank		4/32	1/10	14/151

**Cap and Scale**

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

Waltham Forest Council

### Rates Proportion



### Rates

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

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

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

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

Waltham Forest Council

PFI

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

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

## Five Questions

Q1: Should we change the factors used?

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

Q3: Should we change the primary: secondary ratio?

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

Q5: Do you want us to model any changes?

**Pupil Led Funding Per Pupil**

Highest	George Mitchell School (Primary)	4,692.23
Lowest	St Mary's Catholic Primary	3,674.91
Difference		1,017.32

Highest	Lammas School and Sports College	6,280.66
Lowest	Highams Park School	5,360.08
Difference		920.58

**Pupil Led Funding (Including Pupil Premium) Per Pupil**

Highest	CHINGFORD HALL PRIMARY	5,281.17
Lowest	St Mary's Catholic Primary	3,819.57
Difference		1,461.60

Highest	Lammas School and Sports College	6,751.49
Lowest	Highams Park School	5,608.60
Difference		1,142.89

URN	LAESTAB	School Name	Original	Remove IDACI6	Change	% Change
<b>Total</b>			<b>£86,575,930</b>	<b>£86,575,880</b>	<b>-50.09</b>	
132727	3206905	Walthamstow Academy	£5,594,256.61	£5,512,137.47	-82,119.14	1.47%
103096	3204062	George Mitchell School	£5,358,035.27	£5,283,590.76	-74,444.51	1.39%
103106	3204603	Holy Family Catholic School	£5,399,984.82	£5,349,241.60	-50,743.22	0.94%
138859	3204001	Rushcroft Foundation School	£4,025,983.93	£4,009,130.87	-16,853.06	0.42%
103094	3204060	Frederick Bremer School	£5,881,212.72	£5,872,049.56	-9,163.16	0.16%
133287	3204076	Lammas School and Sports College	£5,333,298.06	£5,325,210.82	-8,087.25	0.15%
103101	3204069	Leytonstone Business and Enterprise Specialist School	£5,211,755.52	£5,205,622.30	-6,133.23	0.12%
140957	3204002	Eden Girls' School Waltham Forest	£1,356,316.03	£1,357,061.82	745.79	0.05%
103097	3204063	Heathcote Secondary School & Science College	£5,770,626.14	£5,777,322.39	6,696.25	0.12%
103098	3204064	Norlington Boys	£3,316,081.16	£3,325,605.08	9,523.92	0.29%
139293	3204061	Connaught School for Girls	£3,526,072.74	£3,535,797.36	9,724.62	0.28%
103080	3204000	Buxton School	£7,903,457.70	£7,917,512.29	14,054.59	0.18%
103103	3204072	WALTHAMSTOW SCHOOL FOR GIRLS	£5,495,461.65	£5,524,123.56	28,661.91	0.52%
138691	3205401	Chingford Foundation School	£6,533,860.39	£6,562,927.60	29,067.21	0.44%
103100	3204066	Willowfield School	£4,082,548.11	£4,119,519.25	36,971.14	0.91%
103105	3204075	Kelmscott Secondary School	£5,503,570.85	£5,554,431.02	50,860.17	0.92%
137558	3205400	Highams Park School	£6,283,408.67	£6,344,596.54	61,187.87	0.97%

IDACI6-Secondary	£1,332,856.34	£0.00	-1,332,856.34
AWPU-Secondary	£62,057,690.80	£63,390,497.05	1,332,806.25
			-50.09
IDACI6-Secondary per pupil	£1,500.00	£0.00	-1,500.00
AWPU-Secondary per pupil	£4,760.00	£4,862.23	102.23

## Schools Block 2016-17 Task and Finish Group

1 July 2015: Follow up

### Modelling any changes

Q: Want to see any formula changes without MFG and when modelling, pair any change with AWPU (e.g. remove IDACI 6 and increase AWPU; or increase lump sum and reduce AWPU)

A: Adopted

Q: Consider capping deprivation/ AEN

A: This can only be done by dropping a factor or reducing the rates applied to factors to ensure no one pupil can produce more than £ x AWPU. Please see next answer.

Q: Look at removal of IDACI 6

A: This has been modelled with the following results (before MFG).

#### PRIMARY

Shifts £995K from Deprivation to AWPU

Loss: -£750 per pupil for IDACI 6; Gain: +£41.79 AWPU

Largest loss: George Mitchell - £88,930

Largest gain: Newport + £22,305

#### SECONDARY

Shifts £1.3 M from Deprivation to AWPU

Loss: -£1,500 per pupil for IDACI 6; Gain +£102.23 AWPU

Largest loss: Walthamstow Academy - £82,119

Largest gain: Highams Park + £61,187

Q: Look at raising Lump Sum

A: This has been modelled to the maximum £175K with the following results (before MFG)

#### PRIMARY

Shifts £4.25M from AWPU to Lump Sum

Loss: -£178.53 per pupil ; Gain: +£85,000 per school

Largest loss: Buxton - £128,720

Largest gain: Emanuel + £66,879

## SECONDARY

Shifts £850K from AWPU to Lump Sum

Loss: -£65.19 per pupil; Gain +£50,000 per school

Largest loss: Chingford Foundation - £25,750

Largest gain: Eden + £36,289

**Q: Has there been growth in EAL?**

A: There has been some growth in primary and a reduction in secondary EAL

		2012	2013	2014	Change
Primary	EAL 3	7,664	7,899	7,899	235
Secondary	EAL 3	982	940	940	-42

**Q: Map number of pupils with deprivation / AEN to see hotspots of most vulnerable and how much funding they attract, including pupil premium**

A: The attached file "Pupil-Led Funding" shows the distribution of pupil-led funding per pupil from highest (e.g. in secondary Lammas @ £6,280) to lowest (Highams Park £5,360) both without and with pupil premium, including by rank. The schools scoring highest are the most vulnerable to changes in Deprivation and AEN factors.

**Q: Rates: compare to Inner London boroughs – is this related to PFI or our low number of secondary academies?**

A: The attached file "Rates" shows that there does not seem to be a clear correlation between PFI or lower number of secondary academies

**Q: Who are the top three for rates?**

A: Newham, Tower Hamlets and Ealing in total amount; Barking, Tower Hamlets and Kingston in proportion of budget.

**Q: Do some comparisons e.g. Lammas v Highams Park**

A: This should be clear from the "Pupil-Led Funding" file both for funding and incidence of Deprivation and AEN



Top 10 London for Rates Total

LA Code	Local Authority Name	Rates Total (£)	Rates Proportion	Rates total Rank	Rates total Rank London	PFI?	PFI amount
316	Newham	4,980,695	1.63%	16	1	NO	
211	Tower Hamlets	4,500,085	1.88%	20	2	YES	2,315,300
307	Ealing	3,358,885	1.54%	34	3	YES	2,114,159
209	Lewisham	3,346,453	1.65%	36	4	NO	
208	Lambeth	3,204,167	1.65%	40	5	YES	200,000
320	Waltham Forest	3,183,577	1.68%	41	6	YES	2,703,034
317	Redbridge	3,047,188	1.51%	44	7	YES	171,344
203	Greenwich	2,376,040	1.28%	55	8	NO	
306	Croydon	2,185,890	0.96%	62	9	NO	
303	Bexley	2,108,235	1.24%	63	10	YES	1,598,000

Top 10 London for Rates Proportion

LA Code	Local Authority Name	Rates Total (£)	Rates Proportion	Rates Proportion Rank	Rates total Rank London	PFI?	PFI amount
301	Barking and Dagenham	3,853,389	2.08%	6	1	YES	
211	Tower Hamlets	4,500,085	1.88%	8	2	YES	2,315,300
314	Kingston upon Thames	1,546,444	1.70%	15	3	NO	
320	Waltham Forest	3,183,577	1.68%	16	4	YES	2,703,034
208	Lambeth	3,204,167	1.65%	18	5	YES	200,000
209	Lewisham	3,346,453	1.65%	19	6	NO	
316	Newham	4,980,695	1.63%	20	7	NO	
308	Enfield	3,958,211	1.62%	23	8	YES	1,265,135
317	Redbridge	3,047,188	1.51%	30	9	YES	171,344
202	Camden	1,602,774	1.41%	39	10	YES	108,296

From Library of the House of Commons: "Converter Academis Statistics, SNSG 24/11/14"

[http://www.parliament.uk/briefing-papers/SN06233.pdf&rct=j&frm=1&q=&esrc=s&sa=U&ei=eYybVbj\\_AaKy7Qb58LCYAw&ved=0CB4QFiAC&usq=AFQjCNEJZGPVHZ0WzoOuXeDV1vd3\\_IT9jQ](http://www.parliament.uk/briefing-papers/SN06233.pdf&rct=j&frm=1&q=&esrc=s&sa=U&ei=eYybVbj_AaKy7Qb58LCYAw&ved=0CB4QFiAC&usq=AFQjCNEJZGPVHZ0WzoOuXeDV1vd3_IT9jQ)

As at 1 November 2014

Nationally:

Primary Converters	1538	9%
Secondary Converters	1343	41%
	2881	

In Waltham Forest:

Primary Converters	13	27%
Secondary Converters	4	31%