

## ITEM 8 - APPENDIX A

### Westminster Schools Forum - Schools Funding Formula Working Group

**Date and time of meeting: Monday 9th December 2013, 4.30 – 6:15 pm**

**Location: Room 12 17<sup>th</sup> Floor, Westminster City Hall, Victoria Street, London SW1P**

<b>Representing</b>	<b>Representative</b>	<b>Organisation</b>	<b>Attendance</b>
Maintained Primary School Governor	Nick Kent (NK)	St Peters Eaton Square Primary – <b>Chair</b>	Schools Forum Member - Present
Maintained Primary School Head	Sandra Tyrrell (ST)	Christchurch Bentinck Primary	Schools Forum Member - Present
Maintained Primary School Head	Mary Wilson (MW)	St Mary of the Angels Primary	Schools Forum Member - Present
Maintained Primary School Governor	Aslam Merchant (AM)	Hallfield Primary	Schools Forum Member - Present
Maintained Primary School Head	Jane Sowerby (JS)	Paddington Green Primary	Observer – Present
Maintained Secondary School Head	Eugene Moriarty (EM)	St Augustine's High	Schools Forum Member - Apologies
Maintained Secondary School Governor	Andrew Garwood Watkins (AGW)	St Augustine's High	Schools Forum Member – Proxy for EM
Non Recoupment Academy Principal	Smita Bora (SB)	Westminster Academy	Schools Forum Member - Present
Recoupment Academies Finance Director	Ken Robb (KR)	Future Academies (Pimlico / Millbank / Churchill Gardens)	Observer – Present
Recoupment Academy Head	Louisa Lochner (LL)	Gateway Academy	Observer - Apologies
Tri Borough Head of Finance (Education & Commissioning)	Tim Gibson (TG)	Tri Borough Children Services	Officer in Attendance
Tri Borough Schools Funding Officer	Mala Dadlani (MD)	Tri Borough Children Services	Officer in Attendance
WCC Interim Business Partner – Schools & Clerk to WSF	Yoke O'Brien (YO)	Tri Borough Children Services	Officer in Attendance

## Introduction

- Introductions were made.
- JS sought clarity on her role.
- NK explained Westminster Schools Forum decision for a small working group consisting of representatives from different schools and academies is set up to discuss, scrutinise and endorse the changes proposed for Westminster Schools Funding Formula for 2014-15.
- NK explained only School Forum Members can vote on a decision but representatives of the Schools Funding Formula Working Group can contribute to the discussions of the meeting.
- AGW Chair of Finance for St Augustine's confirmed that he was substituting for EM.

## Consultations with Schools

- NK introduced the papers.
- TG explained the consultation, the two consultation meetings with schools and discussion at WSF, discussions around what factors would be used and what changes need to be made for this coming year.
- Changes proposed are forced by DfE and removal of certain factors.
- NK referred to MD's report on page 2 – Main feedback from October consultation.
  - To maintain stability and to minimize turbulence.
  - Should we continue use FSM6 or change to FSM for Primary schools.
  - Determination of the lump sum.
- JS said she was at consultation meeting and it was mostly attended by bursars. AGW said he was present at both consultation meetings and he felt it was a valid representation of the schools as the representatives there were sent to represent their school be it bursar, head or governor.
- TG said that Westminster Schools Forum fully supported the continued use of FSM6 and feedback from the schools consultation was in favour of the continued use of FSM6. MW said the majority of schools voted in favour of FSM6.
- TG said there were some very strongly worded responses towards FSM6 and some towards FSM.
- MW asked why is IDACI suggested on Secondary and not Primary.
- MD explained all 3 Secondary school respondents supported it IDACI and on Primary 12 did not support IDACI whilst 6 supported the use of IDACI.
- JS asked how the consultation was counted.
- MD said it was one consultation response per school.
- NK asked about consulting on 2013 data.
- MD explained the timescale of the receipt of the 2013 data set, the time to model the data over Christmas and bring it back to 15th January's Schools Funding Formula working group meeting.
- TG said it is more the principles behind the formula than the data. All it takes is for the data to change.
- MW asked how frequent is the need to consult.
- TG said we only need to consult if the data have materially changed.

- NK referred to the timescale of receiving the data set, revise the data for October 2013 and submission to DfE on Page 3 and asked if we would consult the schools albeit a very period.
- TG said schools will only be informed if the data change significantly.
- AGW said schools will want to know what the change is and how they are affected.
- TG said it has been important to WSF and DMc that schools have had a voice in the building of the Schools Funding Formula.
- AGW said Westminster have had 2 consultations meetings with schools and consulted with schools and now people just want to know the outcome.
- JS suggested we explained the questionnaire.
- NK asked about table on Page 4 and referred to his observation of the table.
- MD explained that the table is the formula as it stands in our statistical family and ALL LAs are reviewing it.
- TG explained the changes to mobility's definition and to EAL.
- MD advised applying caution to the formula.
- AGW asked if the table per pupil in the borough.
- MD said no this is the pure funding formula of each borough in proportion to their overall funding.
- NK drew the working group to paragraph 3.2 to consider the options.
- TG explained the options:
  - (i) Don't do anything
  - (ii) General uplift all sectors excluding Premises and Looked After Children
  - (iii) Consider targeted re-distribution of funding
- MD distributed various models.
- Spreadsheet to illustrate redistribution of funding using uplift of all factors.
- Spreadsheet to illustrate reallocation of funding released from changes in definition for Lump sum and Pupil Mobility Factor Primary Schools.
- Spreadsheet to illustrate reallocation of funding released from changes in definition for Lump sum and Pupil Mobility Factor Secondary Schools.
- Spreadsheet to illustrate reallocation of funding released from changes in definition for Lump sum and Pupil Mobility Factor Non Recoupment Academies.

### **Primary Schools**

- Working group was presented with modelling based on 2012 October data and 2013/14 funding levels. It was therefore to facilitate discussion.
- Main point was the changes in definition and thresholds for attainment(secondary), pupil mobility, lump sum. This is expected to release funding for redistribution through existing factors.
- For primary schools three options were decided for consideration using AWPu/FSM6 as the preferred factors
  - Current proportion which was expected to be in the region of 80-90/20-10

- 50:50
- 60:40
- MD explained that the working group needs to recognise value of funding that would be released which circa £1.7M based on October 2012 data.
- First column what schools get for mobility.
- First line £value-poundage for NOR primary how they will uplift.
- The rank shows who is gaining 38 is the loser- in total value.
- 2<sup>nd</sup> rank shows the comparison what you get now to what you will get.
- Rank 1 is a gainer.
- Rank 38 is a loser.
- MD emphasized the caveat that the supporting modelling information is based on October 2012 data sets and the 2013-14 finance levels and can therefore only be used for illustrative purposes.
- NK asked what the variance is.
- ST asked why schools are losing.
- MD explained this is due to change in rules:
  - (i) reduction in lump sum
  - (ii) change in definition of pupil mobility
- TG said there are 2 mobility columns one in unit or other in £.
- NK said the biggest gainer is Gateway.
- MW out of all 38 schools lose out.
- MD distributed the £1.7M per factor sheet and explained the exemplification of the release per factor. Should we use AWPU with variances gain or loss or now FSM6 to redistributed through.
- Done exercise for EAL and mobility.
- TG exercised caution of the extremes of EAL and mobility.
- AGW asked if Barrow Hill need an extra post to deliver their targets. What's the impact on other schools?
- MW asked about the Early Years Foundation Stage.
- MD explained the data given to us by EFA. EFA said they will try and map the data.
- ST said it's worrying as we are not comparing like for like basis.
- JS said it is disincentive to put resources in High Needs.
- AGW is concerned that shift in FSM could disincentivise people to claim FSM and will have impact on pupil premium. We don't know the impact will be when Universal Provision comes in.
- TG explained about the universal registration which was piloted in Islington and that's why we can't close the door on IDACI.
- AM asked about the criteria for IDACI.
- MD explained the banding of every child –SOA = Super Output Areas.
- AS said postcode don't always give a true reflection.
- TG said we never expect to just use one factor but a combination of IDACI and FSM.
- NK referred to the analysis on AWPU / FSM6.

- NK asked if colleagues are content we don't use EAL3 and mobility.
- Decision: nothing extra on low attainment.
- NK is worried about the position of staff.
- MW FSM6 and a % of IDACI.
- NK thinks for consultation we should use:
  - Pure AWPU
  - Pure FSM6
- AGW referred to the front sheet and commented on the biggest winner and biggest loser overall.
- NK asked what if we leave low attainment alone.
- NK thinks we should show schools the first sheet.
- SB said more £ should be given to schools where children who are not achieving.
- Decision:
  1. Are we putting pupil uplift - Yes
  2. Do we mix AWPU and FSM and at what split:
    - 50:50
    - 70 AWPU : 30 FSM6 - status quo
    - 60 AWPU : 40 FSM6
- AM thinks we should deprivation.
- AGW said parents who don't get benefits have higher deprivation.
- TG suggested using all AWPU and all deprivation.
- MW thinks it will limit options.
- SB said schools will look at their own school line and what impact it has for them.
- We need to say we will have to revisit the use of IDACI for 2015-16.

### **Secondary Schools**

- MD explained it is the same process like Primary Schools. All factors are uplifted. Unlike Primary Mobility remains a factor in Secondary schools.
- On 2012 data there was no secondary school which exceeded 10% on Mobility, therefore Mobility has a relatively small impact on the overall budget.
- AGW felt redistributing £420k to Secondary schools compared to overall budget is not material.
- The question is do we put through this chart and put through one with IDACI.
- SB asked that Secondary Schools be modelled the same as for Primary Schools plus one with IDACI reason being in the consultation response all 3 secondary schools that responded have a preference for IDACI .
- SB said from the various recent DfE meetings she has attended, the DfE will definitely use IDACI as one of the drivers.
- MD asked if the working group is happy to use IDACI 3, 4,5 and 6.
- NK and SB suggested the working group use IDACI 4, 5, 6.
- ST asked what was done before.

- NK said IDACI have not been used in the formula before.
- Decision: page 5 &6.
- For secondary the group also recognised the need to have idaci as a consideration in light of the previous consultation and the forward implications of universal school meals provision at primary level. Representatives at the meeting also acknowledged that meetings they had with DFE supported the need to have some use of IDACI.

### **Falling rolls provision**

- Do we want this fund?
- DFE link to mobility.
- Give them the stability- to avoid the volatility just because of the demographics.
- MW: place planning says one thing but on the ground it is not supported.
- NK explained we used to have a discretionary fund but we abolished it as the schools need to build relationship with the housing authority
- Do we put it out to consultation.
- Free Schools being built.
- Have significant impact on those schools St Mary Magdelene, St Stephens, Paddington Green.
- MW observed that numbers have dropped significantly for Our Lady of Dolours.
- AM said at WSF Ian Heggs said it can be a temporary movement out of school
- AGW – Hallfield estate.
- Are we going to have a fund or not?
- Guide from DFE.
- ST said MFG will protect.
- MD explained that MFG is per pupil calculation.
- We used to have cushioning.
- Do we have a second fund:
- Delegate to officers to come up with proposals.
- Not too large share to protect schools.
- Parameter not to exceed the budget of £x.
- If the fund is not spent it will be redistributed proportionately.
- Current growth fund some known growth and some unforeseen that may materialize.
- TG asked place planning colleagues for basic need & non basic need.
- The amount for growth fund not as big as current year.