

REPORT TO: School Forum
DATE: 29th January 2013
REPORTING OFFICER: Senior Finance Officer
SUBJECT: School Funding Reform 2013-14
WARDS: Boroughwide

1.0 PURPOSE OF THE REPORT

1.1 To inform School Forum of the final funding formula for Primary and Secondary phases for 2013-14.

2.0 RECOMMENDATION: That

- (1) Progress in developing the funding formula for primary and secondary phases be noted;
- (2) School Forum are asked to approve the final funding formula for primary and secondary phases.

3.0 SUPPORTING INFORMATION

- 3.1 At the last School Forum decisions were taken on how the new school funding requirements would be adopted for Halton Primary and Secondary maintained schools, academies and free school.
- 3.2 Only one decision that of how to allocate the cash balance from the secondary phase lump sum conversion needed further discussion. Following meetings with representatives of the secondary schools and academies, agreement was reached to allocate the cash balance using the Free School Meal factor.
- 3.3 The final calculations were completed following School Forum and the meetings with the secondary representatives and the Pro-Forma and supporting spreadsheet was completed and submitted to the Education Funding Agency.
- 3.4 The EFA responded on 15th November stating they were happy with the formula when they completed the 'reasonableness checks' but wanted further information on the PFI factor, the Pupil Growth fund and contingency monies not delegated (held for the proposed Pupil Growth fund). The EFA were contacted and following a brief discussion we were able to submit further information which was accepted on 27th November 2012.
- 3.5 The DSG settlement allocated £81,718,000 to the Schools Block for Halton which covers the main funding for Primary and Secondary phase

establishments. By uplifting the 2012-13 DSG cash value to the 2013-14 pupil numbers, we have a cash total of £38,839,800 available for Primary schools and £40,414,920 available for Secondary schools.

- 3.6 Following the DSG settlement on 19th December and the festive closedown, work is underway to calculate budgets funded by the Schools Block. School Forum members will be asked to review the final funding formula cash values before the submission to the EFA.
- 3.7 The final funding formula has to be submitted by 22nd January. This will be done but we will note that it is subject to School Forum approval. The EFA will then inform us of their approval or request further information. This is expected to take no more than four weeks. Once full approval has been given by the EFA Schools Block budgets will be distributed to Primary and Secondary Schools.

It should be noted that these budgets will exclude nursery unit funding, special unit funding, enhanced provision funding, sixth form funding and outreach funding.

4.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Document	Place of Inspection	Contact Officer
School Funding Reform: Arrangements for 2013-14	Kingsway House	Anne Jones
DSG 2013-14 allocations	Kingsway House	Anne Jones