

**Agenda Item 5**

**Schools Forum**

**23rd February 2015**

**Pupil Number Growth - Template and Criteria for Funding Requests**

**This report is for decision.**

**1. Recommendations:**

That Schools Forum members approve: -

- 1.1 The proposed amendments to the “Pupil Number Growth Fund – Basic” criteria and template.

**2. Purpose**

- 2.1 To obtain approval from Schools Forum members for the proposed amendments to the “Pupil Number Growth Fund – Basic” criteria and template.

**3. Report Details**

- 3.1 At the Schools Forum meeting on 23<sup>rd</sup> February a template for Pupil Number Growth fund was agreed.
- 3.2 A number of applications have subsequently been submitted to schools forum for consideration. Although the application process has been standardised for all schools in the borough, enabling financial and data information to be presented in the same format, there has still been a number of questions on the information presented.
- 3.3 At the school Forum meeting on 7<sup>th</sup> September, members requested that a sub group be set up to review the criteria for the Pupil Number Growth fund as it was felt that there were areas requiring greater clarity and this would help to reduce any subjectivity in the approval process. A revised template is

attached as Appendix 1 with proposed amendments highlighted in red.

- 3.4 The proposed amendments are as follows:
- 3.5 **Increase in pupils is not predominantly in one year group.** The criteria to qualify for additional funding would be the net increase has to exceed 4% of the previous October census and has resulted in the appointment of additional staff or other significant costs.
- 3.6 **Schools Current Budget Position.** The Department for Education recommended carry forward differs for academies to that of maintained schools. The proposal is to replace “DfE recommended” with “local authority recommended limit (8% for Primary and 5% for Secondary).
- 3.7 **General Guidance: section 1.3 Deadline for receiving requests.** The deadline for applications for increase in one year group to be changed to 30<sup>th</sup> October of each year. The deadline for applications for mid year admissions to be 28<sup>th</sup> February of each year, after the October and Jan census.
- 3.8 **Template:Section 3: 3 year projections.** To add a column to the table to include the schools last year financial outturn.
- 3.9 **Balances carried forward for last 3 years.** The inclusion of a table to detail the balances carried forward for the last 3 years.

#### **4. Recommendations**

That Schools Forum members approve:

- 4.1 The proposed amendments to the “Pupil Number Growth Fund – Basic” criteria and template.

Contact Officer: Rosemarie Kerr, Principal Schools Accountant Tel No: 0121 569 8318 Date: 08/10/2015
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[IL1: PROTECT]

**PUPIL GROWTH CONTINGENCY - TEMPLATE**

1. Please detail the change in pupil numbers (since the October census on which your funding was based) across year groups: -

<b>Date of Pupil Count on which funding request is based</b>	
	<b>Change in pupil numbers</b>
<b>Reception/Year 7</b>	
<b>Year 1/Year 8</b>	
<b>Year 2/Year 9</b>	
<b>Year 3/Year 10</b>	
<b>Year 4/Year 11</b>	
<b>Year 5</b>	
<b>Year 6</b>	
<b>Total Change</b>	

2. Please detail additional costs that need to be incurred as a result of the increase in pupil numbers e.g. new staff or reallocation of staff. Please provide grade and salary costs of any staff.

3. Please provide details of the latest 3 year projections for the school.

	<b>Current Year (£000)</b>	<b>Year 2 (£000)</b>	<b>Year 3 (£000)</b>
LA Funding/GAG			
Other Income			
<b>TOTAL FUNDING</b>			
Staffing Costs			
Premises Costs			
Transport Costs			
Admin Supplies			
ICT			
Learning Resources			
<b>TOTAL EXPENDITURE</b>			
B/fwd Balance			
<b>CUMULATIVE BALANCE</b>			
<b>Balance as % of Funding</b>			

4. For the current financial year please provide details of items earmarked from your projected balance and the remaining balance.

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<b>Projected Balance – Current Year</b>	
<b>Earmarked amounts: -</b>	
<b>Remaining Balance</b>	
<b>%</b>	

Following this, if your projected balance is above the recommended limit (8% for Primary and 5% for Secondary) **no funding will be allocated**. If your projected balance is below 2% please explain why these additional costs cannot be covered by your existing budget.

5. Are you requesting funding for additional language and deprivation needs as part of this?

[IL1: PROTECT]

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Yes/No

[IL1: PROTECT]