

Schools Forum

MONDAY 11th MARCH 2019 AT 2.30PM AT OLDBURY COUNCIL HOUSE, COMMITTEE ROOM 2 Agenda

(Open to Public and Press)

- 1. Apologies for absence.
- 2. Members to declare any interest in matters to be discussed at the meeting.
- 3. To confirm the minutes of the meeting held on 14th January 2019.
- 4. School Budgets 2019/20 (Including Early Years and High Needs).
- 5. Working Group to be set up Proposals for graduated change in ratio
- 6. Schools in Financial Difficulties Process
- 7. High Needs Block Budget Monitoring 2018/19
- 8. Arrangements for Pupils with SEN, the use of PRU's, the education of children otherwise than at school; arrangements for EY provision
- 9. Teachers' Pension consultation LA Response
- 10. Fair Funding Schemes update
- 11. School Forum Forward Plan 2019/20
- 12. AOB

Next Meeting:

17th June 2019; Venue TBC

Schools Forum Distribution to Members:

Head Teachers Advisory Forum - Primary Schools (6)

Mr R Kentish, Mr P Jones, Ms K Bickley, Ms L Gillam, Ms C Walsh, Mr G Linford

<u>Head Teachers Advisory Forum – Secondary Schools (4)</u>

Mr P Shone, Mr A Burns, Mr D Irish, M Arnull

<u>Head Teachers Advisory Forum – Special School (1)</u>

Mr N Toplass

School Governors (4)

Mr B Patel, Ms. C. Gallant, Mr J Smallman, Ms L Howard, Ms A Cysewski

Trade Union (1)

Mr. D Barton

Early Years Partnership (1)

Ms A Sahota

14-19 Provider (1)

D Holden

Pupil Referral Unit (1)

K Morgan

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Agenda Item 4

Schools Forum

11th March 2019

School Budgets 2019-20

This report is for information

1. Recommendations:

That Schools Forum members:

1.1 Note the contents of the report

2. Purpose

2.1 To inform Schools Forum members of the final school budget information including Schools Block, Early Years and High Needs Block, Pupil Premium Grant (PPG), and Devolved Formula capital (DFC).

3. <u>Links to School Improvement Priorities</u>

3.1 The report allows school governing bodies and academy boards to complete their financial planning for 2019/20 and to make appropriate structural and educational adjustments to meet the needs of young people within the constraints of their resource allocations.

4. Report Details

4.1 At its meeting on 14th January, Schools Forum members recommended the principles for the allocation of the Schools Block of the Dedicated Schools Grant (DSG); that the ratio of funding from primary to secondary should be maintained at 1:1.23. The principals were adopted by Cabinet on 20th February 2019 and this

information was formally issued to schools on the 28th February 2019.

- 4.2 It was also recommended that an options paper should be developed by Primary and Secondary schools working together through Schools Forum to consider the impact on the educational journey of children of staged movement towards the National Funding Formula model.
- 4.3 Information on Early years, High needs, Pupil Premium Grant and Devolved Formula Capital grant were also included in school Budget Information document that was released. (refer to appendix 1).

Early Years

4.4 Early Years funding for mainstream schools have been calculated based on the average of the termly hours for a year. Provisional Census data has been used for the January 2019 figures as the census has yet to be finalised.

High Needs

4.5 High needs funding for mainstream schools (for pupils costing above £10k and Focus Provision units) has now been calculated and included in the school budget information.

Pupil Premium Grant

- 4.6 Pupil Premium Grant figures are for illustrative purposes only and are based on January 2018 census data. Actual 2019/20 allocations will be based on pupils on roll in January 2019 and Free School Meals (FSM) history on all pupil level censuses since Summer 2013.
- 4.7 Each Primary FSM Ever 6 eligible pupil will attract £1,320; secondary pupils will attract £935. Each Looked After Child will attract £2,300 and each Service Child will attract £300.

Devolved Formula Capital

4.8 The rates for DFC remain the same as 2018/19 at £4,000 lump sum per school, and a variable per pupil sum of £11.25 for primary pupil, £16.88 secondary pupil, and £33.75 PRU pupils. It now also includes £22.50 per Post 16 pupil. The allocations are provisional and will be confirmed after March 2019.

4.9 Pupil numbers are based on the October school census and the 2017/18 Individualised Learner Record.

Post 16

4.10 The Department for Education have yet to inform the authority and the relevant schools of their funding factors and student numbers based on the autumn census. They will confirm the details by the middle of March 2019.

5. Recommendations

- 5.1 That Schools Forum members
- 5.2 Note the content of the school budgets 2019/20; with the Schools Block element that was formally issued to schools on 28^h February 2019 in line with the Schools and Early Years Finance regulations. The other elements of funding; Early years, high needs, Pupil Premium Grant and Devolved Formula Capital grant was also issued on 28th February 2019.

Rosemarie Kerr, Principal Accountant – Schools

Date: 05/03/2019

Contact Officer: Rosemarie Kerr Tel No: 0121 569 8318

TABLE A: 2019-20 SCHOOL BUDGETS - MAINSTREAM SCHOOLS

																											DEVO	LVED FO				
				1 1		2018	8-19 	l										2019	9-20	1								CAPITA	<u>L</u>		CHANGE	MEMO
	DSG (£)	EARLY YEARS	MINIMUM FUNDING		HIGH NEEDS FUNDING NON FOCUS	HIGH NEEDS FUNDING FOCUS	EQUAL VALUE PAY CLAIM	DE- DELEGATED	EDUCATION (C)	PFI (£)	TOTAL (£)	PUPIL NUMBERS	DSG (£)	EARLY YEARS	MINIMUM FUNDING	POST 16 FUNDING	HIGH NEEDS FUNDING NON FOCUS	HIGH NEEDS FUNDING FOCUS	EQUAL VALUE PAY CLAIM (£)	DE-DELEGATED FUNDING (£)	EDUCATION	PFI	TOTAL (£)	PUPIL NUMBERS	ILLUSTRATIVE PUPIL PREMIUM	TOTAL SCHOOLS REVENUE FUNDING	2018-19 (£)	2019-20 (£)	DIFF(£)	TOTAL SCHOOLS FUNDING INC DFC	PUPIL FUNDING EX PPG & DFC	C NOTIONAL SEN
		(£)	GUARANTEE (£)	(£) F	PROVISION (£)	PROVISION (£)	(10/15) (£)	FUNDING(£)	FUNCTIONS (£)			NUMBERS		(£)	GUARANTEE (£)	(£)	PROVISION (£)	PROVISION (£)	(11/15)	FUNDING (£)	FUNCTIONS			NUMBERS	2019-20 (£)	2019/20 (£)				2019/20 (£)	NUMBERS PPG & DFC	BUDGE1 2019-20 (E
SCHOOLS	A	В	С		D	E	F	G	Н	1		J	K	L	М	N	0	Р	Q	R	S	Т		U	V	w	X	Y		Z	AA AB	AC
ABBEY INFANT ABBEY JUNIOR	1,149,441	107,445 0	(0 0	26,226 21,630	0	-7,116 -8,368	-8,181 -11.029	-3,694 -4,980	0	1,264,122 1,447,231	270 364	1,132,099 1,455,181	139,593	0	0	26,068 34,474	0	-7,116 -8,368	-10,013 -13,692	-3,624 -4,955	0	1,277,007 1,462,639	264 361	56,080 119,100	1,333,087 1,581,739	7,434 8,061			1,340,057 1,589,800	-6 1.029 -3 1.069	
ALBERT PRITCHARD INF	1,151,784	153,102	8,841	1 0	7,963	0	-5,512	-7,938	-3,585	0	1,304,654	262	1,152,486	129,086	5,512	0	12,884	0	-5,512	-10,013	-3,624	0	1,280,818	264	75,240	1,356,058				1,363,028	2 -1.839	% 115,74
ALL SAINTS JR & INF ANNIE LENNARD INF	1,518,968 1,065,673	91,200 60,791	84.985	5 0	34,032	0	-3.859	-11,150 -7.393	-5,035 -3,338	0	1,628,016 1,196,858	368 244	1,640,455 1,035,748	88,559 46,531	66,699	0	28,027	0	-3.859	-15,020 -8,951	-5,436 -3,239	0	1,736,586 1,132,928	396 236	112,200 97,640	1,848,786 1,230,568	6.527	7 6.65	5 12	1,848,786 3 1,237,223	28 6.679 -8 -5.349	
BEARWOOD JR & INF	1,814,068	142,880	(0 0	31,213	0	-11,581	-12,816	-5,788	0	1,957,976	423	1,797,169	108,072	0	0	37,922	0	-11,581	-15,930	-5,765	0	1,909,887	420	190,720	2,100,607	9,141			2,109,332	-3 -2.469	% 213,54
BLACKHEATH JR & INF BLEAKHOUSE JUNIOR	2,128,404 1,036,389	123,120	(0 0	79,395 26,000	0	-6.076	-13,483 -7,241	-6,089 -3 270	-208,327	2,103,019 1,045,802	445 239	2,142,876 1.046.824	122,360	0	0	86,979 33,725	0	-6,076	-16,878 -9,103	-6,108 -3,294	-216,661 0	2,112,568 1,062,076	445 240	241,820 92,660	2,354,388 1,154,736				2,363,394 1 1,161,436	0 0.459 1 1.569	
BRANDHALL JR & INF	1,786,911	169,613	(0 0	50,414	0	-7,441	-12,483	-5,637	0	1,981,376	412	1,703,733	160,402	0	0	62,981	0	-7,441	-14,906	-5,394	0	1,899,374	393	224,400	2,123,774	8,961	1 8,42	1 -540	2,132,195	-19 -4.149	% 230,96
BRICKHOUSE JR & INF BURNT TREE JR & INF	946,861 1,506,710	51,680 75,801	36 270	0 0	33,484 44,844	0	-5,186 -5,595	-6,090 -10,211	-2,750 -4,611	0	1,017,999 1,643,217	201	980,868 1,600,939	56,240 69,046	55.834	0	34,141 38,198	0	-5,186 -5,595	-7,927 -13,882	-2,869 -5,024	0	1,055,268 1,739,517	209 366	123,740 166,320	1,179,008 1,905,837				3 1,185,359 3 1,913,955	8 3.669 29 5.869	
CAPE JR & INF	2,851,648	126,160	30,27	0 0	54,582	0	-12,352	-18,785	-8,483	0	2,992,770	620	2,744,422	122,360	00,004	0	41,061	0	-12,352	-22,643	-8,194	0	2,864,653	597	312,840	3,177,493				3,188,210	-23 -4.289	
CAUSEWAY GREEN JR & INF	1,819,986 1,728,199	111,074 105,640	(0 0	53,765 60,583	147.470	-9,603	-12,453	-5,623	0	1,957,146	411	1,820,059 1,842,345	102,068 119,320	4,434 3.806	0	73,855 79,381	139.435	-9,603	-15,740 -15,778	-5,696 -5,710	0	1,969,377 2,162,799	415	243,820	2,213,197 2,346,279	8,955	5 8,669	9 -286	2,221,865 2,346,279	4 0.629 31 6.819	
CHRIST CHURCH JR & INF CORNGREAVES PRIMARY	949,340	105,640	(0 0	50,808	147,470	-4,876	-11,005	-5,266	0	2,024,959 995,272	217	927,549	119,320	1,868	0	42,871	139,435	-4,876	-15,776	-5,710	0	967,413	213	183,480 0	967,413	0	0 (0 (967,413	-4 -2.809	
CROCKETTS LANE PRIMARY	1,956,537 1,374,339	142,557	1,083	3 0	52,389	200,345	-7,325	-12,423	-5,610	0	2,327,553	410	2,071,630	161,120	19,616 23,320	0	46,540	206,063	-7,325	-16,764	-6,067	0	2,474,811	442	174,240	2,649,051		8,97	3 81	2,658,024	32 6.339	% 318,58
DEVONSHIRE INF ACADEMY DEVONSHIRE JR ACADEMY	1,574,539	194,560 0	(0 0	20,958 43,531	53,928 48,840	-8,859 -9,087	0	0	0	1,634,926 1,679,732	371	1,309,879 1,577,519	173,280 0	23,320	0	58,159 38,640	39,683 70,304	-8,859 -9,087	0	0	0	1,595,461 1,677,376	365	0	1,595,461 1,677,376		0 (0 (1,595,461	-7 -2.419 -6 -0.149	
EATON VALLEY JR & INF	1,772,654	108,680	00.000	0 0	8,736	0	-7,774	-12,392	-5,596	0	1,864,308	409	1,816,485	104,880	0	0	15,123	0	-7,774	-15,816	-5,724	0	1,907,174	417	151,800	2,058,974				2,067,665	8 2.309	% 219,11
FERNDALE JR & INF GALTON VALLEY PRIMARY	2,259,111 2,318,557	121,524 127,756	39,869	0 0	32,369 33,535	172,768 154,028	-11,509 0	-16,816 -13,665	-7,594 -6,171	-215,707	2,589,722 2,398,334	555 451	2,258,071 2,295,864	120,042 112,176	20,293	0	74,192 30,654	192,100 145,122	-11,509 0	-21,126 -16,916	-7,645 -6,122	-224,335	2,624,416 2,336,443	557 446	148,780 192,720	2,773,196 2,529,163				2,783,462 2,538,180	2 1.349 -5 -2.589	
GEORGE BETTS PRIMARY ACADEMY	1,875,301	109,440	22,491	11 0	16,461	0	-10,032	0	0	0	2,013,662	413	1,835,770	98,040	30,229	0	29,105	0	-10,032	0	0	0	1,983,112	408	0	1,983,112		0 (0 (1,983,112	-5 -1.529	% 267,59
GLEBEFIELDS JR & INF GRACE MARY JR & INF	1,832,099	123,082 87,400	(0 0	14,789 22,916	164.339	-8,845 -7,205	-12,150 -7,211	-5,487 -3,256	0	1,943,489 1,346,491	401 238	1,814,355 1,095,979	119,187 90,440	0	0	41,168 16,712	139,435	-8,845 -7,205	-15,058 -9,141	-5,449 -3,308	0	1,945,358 1,322,913	397 241	278,520 126,380	2,223,878 1,449,293				2,232,345 7 1,456,004	-4 0.109 3 -1.759	
GREAT BRIDGE JR & INF	2,223,861	112,575	(0 0	59,395	153,680	-10,929	-13,635	-6,157	-211,441	2,307,349	450	2,206,542	104,880	0	0	64,182	153,680	-10,929	-16,802	-6,081	-219,899	2,275,574	443	186,040	2,461,614	9,429	9 8,98	4 -44	2,470,598	-7 -1.389	% 309,63
GROVE VALE JR & INF HANBURY PRIMARY	1,686,651 1,930,304	135,546	(0 0	30,881 31,136	0	-8,632 -11,357	-12,816 -12,665	-5,788 -5,719	0	1,690,297 2,067,245	423 418	1,696,473 1,920,028	141,778	0	0	28,997 41,056	0	-8,632 -11,357	-15,968 -15,816	-5,779 -5,724	0	1,695,091 2,069,965	421 417	79,200 176,540	1,774,291 2,246,505	8,748 9,180			1 1,783,028 2,255,196	-2 0.289 -1 0.139	
HALL GREEN JR & INF	1,885,542	110,618	(0 0	46,397	0	0	-12,513	-5,651	0	2,024,393	413	1,927,393	119,966	0	0	37,148	0	0	-15,968	-5,779	0	2,062,761	421	270,140	2,332,901	8,982	2 8,736	6 -24	2,341,637	8 1.909	% 292,61
HAMSTEAD INF HAMSTEAD JUNIOR	806,066 1,007,483	102,999	(0 0	8,736 16,423	0	-5,318 -5,852	-5,211 -7,211	-2,353	0	904,918 1,007,586	172	802,970 1,010,952	94,107	645	0	4,307 13,000	0	-5,318 -5,852	-6,524 -8,951	-2,361 -3,239	0	887,827 1,005,909	172	63,360 118,800	951,187 1,124,709				957,122 4 1,131,364	0 -1.899	% 71,74
HARGATE JR & INF	1,655,143	128,440	42,681	1 0	43,789	241,275	-5,852 -6,488	-7,211	-5,254	0	2,087,952	384	1,793,517	158,080	50,140	0	76,101	292,065	-6,488	-16,006	-5,792	0	2,341,617	422	180,840	2,522,457	8,007			2,531,204	38 12.159	% 211,81
HARVILLS HAWTHORN PR	2,022,591	108,680	(0 0	50,978	0	-9,350	-13,301	-6,007	0	2,153,591	439	1,956,885	110,200	2,205	0	39,973	0	-9,350	-16,954	-6,136	0	2,076,823	447	198,300	2,275,123				2,284,152	8 -3.569	
HATELEY HEATH PRIM HIGHFIELDS JR & INF	1,798,761 1,684,882	117,040 114,760	(0 0	57,600 23,514	0	-9,118 -10,071	-12,544 -12,604	-5,664 -5,692	0	1,946,075 1,794,789	414	1,754,895 1,682,985	111,074 110,960	9,825	0	66,485 14,195	0	-9,118 -10,071	-15,475 -15,778	-5,600 -5,710	0	1,912,086 1,776,581	408 416	227,340 116,800	2,139,426 1,893,381				2,148,016 1,902,061	-6 -1.759 0 -1.019	
HOLY NAME RC JR & INF	864,002	52,611	(0 0	3,362	0	0	-6,332	-2,860	0	910,783	209	835,870	48,165	0	0	7,276	0	0	-7,548	-2,731	0	881,031	199	37,260	918,291	0	0 (0 (918,291	-10 -3.279	% 84,16
HOLY TRINITY JR & INF HOLYHEAD PRIMARY ACADEMY	1,776,868 961,370	121,524 57,000	43,328	8 0	29,284 16,649	0	-9,037 -4,911	-11,938 0	-5,391	0	1,944,639 1,041,346	203	1,850,190 960,208	135,546 45,182	29,408 4,078	0	36,114 16,102	0	-9,037 -4,911	-15,665 0	-5,669 0	0	2,020,888 1,020,659	413 201	190,380	2,211,268 1,020,659	8,388	8 8,646	0 (2,219,914	19 3.929 -2 -1.999	
JOSEPH TURNER JR & INF	1,822,107	122,303	(0 0	38,612	0	-8,525	-12,180	-5,500	0	1,956,816	402	1,821,864	117,629	0	0	39,488	0	-8,525	-15,171	-5,490	0	1,949,795	400	231,000	2,180,795	8,763	3 8,50	0 -26	2,189,295	-2 -0.369	% 284,60
JUBILEE PARK ACADEMY KING GEORGE V PRIMARY	910,069	66,234 64,657	(0 0	36,450 45,963	0	-6,312 -5,396	-6.484	-2.928	0	1,006,441 1,116,200	190 214	945,546 996,419	43,624 55,309	10.198	0	16,048 45,985	0	-6,312 -5,396	-8,041	-2,910	0	998,906 1,091,564	196 212	107,220	998,906 1,198,784	6.491	1 6.38	5 -10	998,906 1,205,169	6 -0.759	
LANGLEY JR & INF	1,792,278	104,880	3,680	0 0	30,870	0	-8,695	-12,665	-5,719	0	1,904,630	418	1,754,605	96,520	13,521	0	36,763	0	-8,695	-15,702	-5,683	0	1,871,329	414	174,540	2,045,869	8,997	7 8,658		2,054,526	-4 -1.759	% 232,25
LIGHTWOODS JR & INF LODGE JR & INF	1,276,268	85,880	(0 0	34,265 37,968	0	-5,021 -7,609	-8,332 -12,574	-3,763 -5.678	0	1,293,417 2,000,089	275 415	1,360,746 1,842,017	91,200	3,120	0	24,130 34,119	0	-5,021 -7,609	-11,454 -15,285	-4,145 -5,532	0	1,367,375 1,938,909	302 403	37,900 154,440	1,405,275 2,093,349				1,412,672 2,101,883	27 5.729 -12 -3.069	
LYNG JUNIOR & INF	1,919,808	145,673	(0 0	64,902	0	-7,829	-13,210	-5,965	0	2,103,377	436	1,975,945	135,546	0	0	87,032	0	-7,829	-16,878	-6,108	0	2,167,707	445	197,620	2,365,327	9,058			2,374,333	9 3.069	% 266,82
MESTY CROFT ACADEMY MOAT FARM INF	1,642,969 1,570,028	105,640 91,561	7,694 17,420		31,830 38,574	0	-8,287 -7,344	-10.938	-4 939	0	1,779,847 1,694,361	404 361	1,679,717 1,564,414	108,680 104,120	24.557	0	28,027 67,209	0	-8,287 -7,344	-13,806	-4,996	0	1,808,137 1,734,155	413 364	0 121,440	1,808,137 1,855,595		8 8.09	0 (1,808,137 3 1,863,690	9 1.599 3 2.359	
MOAT FARM JUNIOR	2,009,899	0	17,420	0 0	36,147	0	-10,580	-14,604	-6,595	0	2,014,267	482	2,016,871	0	0	0	36,227	0	-10,580	-18,168	-6,575	0	2,017,776	479	207,200	2,224,976	9,355	5 9,389	9 34	2,234,364	-3 0.179	% 303,99
MOORLANDS JR & INF NEWTOWN JR & INF	928,278 1,012,954	69,388	(0 0	10,135 26,657	0	-5,069 -5,924	-6,332 -6.332	-2,860	0	924,152 1,093,882	209	941,026 971,340	56,772	0	0	4,417 18,563	0	-5,069 -5,924	-7,965 -7,586	-2,882 -2,745	0	929,527 1,030,420	210	111,520 109,560	1,041,047 1,139,980	6,363 6,657			1,047,409 7 1,146,230	1 0.589	% 101,09
DAKHAM JR & INF	1,675,923	122,360	(0 0	55,941	0	-10,563	-12,695	-5,733	0	1,825,233	419	1,691,106	123,880	0	0	62,599	0	-10,563	-15,968	-5,779	0	1,845,275	421	117,780	1,963,055	9,067			1,971,791	2 1.109	
OCKER HILL INFANTS	828,884 1.073.605	164,160	(0 0	39,885 51,284	7 225	-5,395	-5,424	-2,449	0	1,019,661	179	836,002 1.088.811	142,120	0	0	40,947 34,668	85.470	-5,395 -5,972	-6,865	-2,484	0	1,004,324 1,202,977	181 251	57,400	1,061,724 1,202,977	6,531	1 6,036	6 -49	1,067,761	2 -1.509 1 6.829	% 84,41
OCKER HILL ACADEMY OLD HILL JR & INF	945,933	83,600	5,905	5 0	4,593	0	-5,972 -5,470	-6,332	-2,860	0	1,126,152 1,025,369	209	967,464	82,840	0	0	8,565	05,470	-5,470	-8,041	-2,910	0	1,042,448	212	127,360	1,169,808		4 6,38	5 -149	1,176,193	3 1.679	% 134,21 % 109,23
OLD PARK JR & INF PARK HILL JR & INF	1,826,697 940,301	177,840	11,248	8 0	55,115	0	-10,648 -5,795	-13,635 -6.605	-6,157	0	2,040,460 1,043,424	450	1,799,528 946,194	157,320 106,571	20,695	0	59,575 46,373	0	-10,648 -5,795	-17,030 -8,268	-6,163	0	2,003,277 1,082,082	449	144,860	2,148,137 1,137,522				7 2,157,189 9 1,143,974	-1 -1.829 0 3.709	
PENNYHILL PRIMARY	2,622,343	99,294 121,600	(0 0	19,212 30,957	0	-5,795	-19,361	-2,983	0	2,731,893	639	2,634,521	106,571	0	0	45,101	0	-5,795	-8,268	-2,992 -8,826	0	2,734,864	643	55,440 305,900	3,040,764				3,051,998	4 0.119	
PERRYFIELDS JR & INF	1,496,713	0	(0 0	36,822	0	-5,151	-10,938	-4,939	0	1,512,508	361	1,576,392	0	0	0	34,702	0	-5,151	-14,565	-5,271	0	1,586,108	384	105,900	1,692,008	7,319	9 8,320	0 1,00	1,700,328	23 4.879	% 171,76
PRIORY PRIMARY REDDAL HILL JR & INF	1,206,547 1,495,479	67,023 89,680	(0 0	47,690 26,567	0	-7,282 -4,934	-7,938 -10,423	-3,585 -4,707	0	1,302,454 1,591,662	344	1,338,027 1,678,544	82,574 90,440	0	0	34,214 49,557	0	-7,282 -4,934	-11,113 -14,640	-4,022 -5,298	0	1,432,398 1,793,668	386	184,420 167,640	1,616,818 1,961,308	6,565 7,400			1 1,624,115 3 1,969,650	31 9.989 42 12.699	
ROOD END JR & INF	2,241,554	113,240	(0 0	29,185	0	-8,667	-14,604	-6,595	0	2,354,113	482	2,126,965	101,840	19,533	0	35,309	0	-8,667	-17,561	-6,355	0	2,251,064	463	223,080	2,474,144	9,108	9,20	9 10	2,483,353	-19 -4.389	% 315,15
ROUNDS GREEN JR & INF ROWLEY HALL JR & INF	1,699,329 2,416,549	80,304 133,760	(0 0	36,627 39,157	0	-9,039 -9,939	-11,998 -17,664	-5,418 -7,977	0	1,789,804 2,553,885	396 583	1,718,677 2,593,699	69,797 124,640	0	0	30,514 67,749	0	-9,039 -9,939	-14,944 -23,630	-5,408 -8,551	0	1,789,597 2,743,967	394 623	203,280 278,100	1,992,877 3,022,067				2,001,309 1 3,033,076	-2 -0.019 40 7.449	% 328,53
RYDERS GREEN JR & INF	1,896,394	111,397	(0 0	39,291	0	-9,793	-12,726	-5,747	0	2,018,817	420	1,873,819	105,165	0	0	38,345	0	-9,793	-15,778	-5,710	0	1,986,048	416	198,980	2,185,028	9,009	9 8,68	0 -32	2,193,708	-4 -1.629	% 251,36
SACRED HEART JR & INF SHIRELAND HALL PRIMARY ACADEMY	1,172,497 2,864,753	53,200 104,386	20,804	4 0	71,855 122,610	0	-4,195 -9,584	-6,938 0	-3,133 0	0	1,283,285 3,102,970	229 635	1,406,762 2,825,278	86,640 146,680	7,765 24,481	0	68,534 140,725	0	-4,195 -9,584	-11,227 0	-4,063 0	0	1,550,216 3,127,579	296 630	116,460 0	1,666,676 3,127,579	5,568	7,330	0 1,762	2 1,674,006 3,127,579	67 20.809 -5 0.799	
SHIRELAND HIGH TECH PRIMARY	0	0	(0	0	0	0	0	0	0	0	0	201,286	0	0	0	0	0	0	0	0	0	201,286	35	0	201,286	0	0 (0 (201,286	35 0.009	% 2,48
SPRINGFIELD PRIMARY ST FRANCIS XAVIER SCHOOL	1,740,376 1,000,513	122,031 74,480	(0 0	3,639 17,498	148,007	-10,459 0	-12,301 0	-5,555 0	0	1,985,737 1,092,491	406 215	1,782,030 977,297	114,977 69,160	6,354	0	15,453 15,037	93,893	-10,459 0	-15,854 0	-5,737 0	0	1,974,301 1,067,848		184,800 0	2,159,101 1,067,848		0 8,700	0 -16	2,167,804 1,067,848	-3 -2.269	
ST GREGORY'S RC PRIMARY	1,051,952	46,531	(0 0	4,593	0	0	0	0	0	1,103,076	243	1,028,703	34,960	0	0	21,016	0	0	0	0	0	1,084,679	237	0	1,084,679	C	0 (0 (1,084,679	-6 -1.679	% 110,50
OUR LADY AND ST HUBERTS ST JAMES CE PRIMARY	1,280,676 1,898,784	91,922	(0 0	47,379 64,465	0	-9,882	-12,786	-5.774	0	1,328,055 2,026,728	307 422	1,347,611 1,955,356	97,280	0	0	46,361 90,246	0	-9,882	-16,575	-5,998	0	1,393,972 2,110,427		280,440	1,393,972 2,390,867		0 (7 8,916	6 23	1,393,972 2,399,783	31 4.969 15 4.139	
ST JOHN BOSCO JR & INF	943,502	91,200	(0 0	10,555	0	0,002	-6,454	4,1.1	0	1,035,889	213	956,344	92,720	0	0	22,479	0	0	-8,117	-2,937	0	1,060,489		79,200	1,139,689	0	0 (0 (1,139,689	1 2.379	% 109,70
ST JOHN'S C OF E ACADEMY ST MARGARETS JR & INF	922,896 864,386	65,949	12,466	0 0	0 1,914	0	0	-6.363	-2.873	0	935,362 923,012	207	934,415 866,207	68,172	7,680	0	3,638 7,366	0	0	-7,851	-2,841	0	945,733 931,052	210 207	35,300	945,733 966,352		0 (0 (945,733 966,352	3 1.119 -3 0.879	
ST MARTINS JR & INF	944,190	76,551	5,653	3 0	27,883	50,000	-5,505	-6,393	-2,887	0	1,089,492	211	939,572	74,300	0	0	31,804	77,630	-5,505	-7,965	-2,882	0	1,106,954	210	68,640	1,175,594	6,700			1,181,956	-1 1.609	% 102,30
ST MARY MAG JR & INF ST MARY'S JR & INF	930,143 947,768	52,136 69,920	(0 0	26,475 27,048	0	-5,776 0	-6,332 -6,514	-2,860 -2 942	0	993,786 1,035,280	209	939,748 968,722	44,080 63,840	0	0	20,500 35,752	0	-5,776 0	-7,965 -8,193	-2,882 -2,965	0	987,705 1,057,157	210	64,340 77,880	1,052,045 1,135,037	6,553	6,36	3 -19	1,058,407 1,135,037	1 -0.619	
ST MATTHEWS JR & INF	1,194,519	95,817	(0 0	60,389	0	0	-7,423	-3,352	0	1,339,949	245	1,339,716	99,712	0	0	38,872	0	0	-10,430	-3,775	0	1,464,095	275	111,180	1,575,275		0 (0 (1,575,275	30 9.269	% 190,87
ST PAULS C OF E ACADEMY ST PHILIPS CATHOLIC PRIMARY SCHOOL	931,094 1,055,965	72,200 70,110	(0 0	17,472	0	-5,851	0	0	0	997,443 1,143,547	208	935,570 1,044,795	35,720 66,234	1.396	0	22,808 23,079	0	-5,851	0	0	0	988,247 1,135,504		0	988,247 1,135,504		0 (0 (988,247 1,135,504	0 -0.929 -1 -0.709	
SUMMERHILL PRIMARY	3,153,339	148,789	(0 0	110,239	0	-8,068	0	0	0	3,404,300		3,191,351	123,120	0	0	115,161	0	-8,068	0	0	0	3,421,565		0	3,421,565		0 (0 (3,421,565	13 0.519	
TAMESIDE PRIMARY ACADEMY TEMPLE MEADOW JR & INF	2,515,722 1,643,123	135,546 87,809	(0 0	64,217 34,677	0	-11,559 -8,766	-17,846 -11,756	-8,059 -5,309	0	2,678,021 1,739,778	589	2,334,123 1,635,675	106,400 77,520	0	0	83,218 26,565	0	-11,559 -8,766	-14,640	-5,298	0	2,512,183 1,711,056		221,420	2,512,183 1,932,476			0 -10,46	7 2,512,183 1 1,940,819	-51 -6.199 -2 -1.659	% 343,68
TIMBERTREE JR & INF	902,731	51,870	26,009	9 0	10,676	0	-4,819	0	0	0	986,467	208	900,015	67,545	23,261	0	14,501	0	-4,819	0	0	0	1,000,504	208	0	1,000,504	0	0,34	0 (1,000,504	0 1.429	% 110,55
TIPTON GREEN JUNIOR TIVIDALE COMMUNITY	1,598,145 1,794,990	0 141,531	(0 0	24,917 34,450	0	-7,377 -10,391	-10,908 -12,635	-4,926 -5,705	0	1,599,852	360	1,643,080 1,803,437	139,308	0	0	34,902 70,649	0	-7,377 -10,391	-13,541 -15,968	-4,900 -5,779	0	1,652,164 1,981,257	357 421	177,860	1,830,024 2,105,637				1,838,041 2,114,373	-3 3.279 4 2.019	% 285,48
TIVIDALE COMMUNITY TIVIDALE HALL JR & INF	1,794,990	141,531	(0 0	34,450	0	-10,391 -9,857	-12,635 -12,695	-5,705 -5,733	0	1,942,240 1,823,679	417	1,803,437	139,308	0	0	43,339	0	-10,391 -9,857	-15,968 -15,854	-5,779	0	1,981,257		124,380 139,240	2,105,637 1,940,289				2 2,114,373 9 1,948,992	-1 -1.249	% 188,71
JPLANDS PRIMARY	3,753,055	218,833	2 554	0 0	59,186	84,673	-16,982 -7,409	-26,299	-11,876	0	4,060,588	868	3,639,669	210,758	0	0	93,043	85,982	-16,982	-32,429	-11,736	0	3,968,305	855	455,700	4,424,005	13,808			4,437,623	-13 -2.279	% 541,08
SILVERTREES VICTORIA PARK PRIMARY ACADEMY	1,230,585 2,355,518	183,160 119,187	2,554	0 0	37,595 18,050	0	-7,409 -12,560	0	0	0	1,446,485 2,480,195	264 519	1,193,240 2,472,533	142,120 119,966	25,783 0	0	34,796 53,314	0	-7,409 -12,560	0	0	0	1,388,530 2,633,252	262 549	0	1,388,530 2,633,252		0 (0 (1,388,530 2,633,252	-2 -4.019 30 6.179	% 151,30 % 375.19
WARLEY INFANTS	910,033	88,559	14,579	9 0	8,736	0	-5,261	-5,484	-2,476	-95,533	913,152	181	882,576	69,046	7,373	0	8,736	0	-5,261	-6,562	-2,375	-99,354	854,179	173	75,240	929,419	6,376	5,94	6 -43	935,365	-8 -6.469	% 59,26
WEDNESBURY OAK ACADEMY WHITECREST JR & INF	1,736,903 857,837	101,840 0	(0 0	29,313 7,366	0	-10,180 -4,829	-6.363	-2.873	0	1,857,876 851,138	409 210	1,733,624 870,181	110,960	0	0	17,670 3,069	0	-10,180 -4,829	-8,003	-2,896	0	1,852,074 857,522	406 211	27,380	1,852,074 884,902		6 6,37	4 -2:	1,852,074 891,275	-3 -0.319 1 0.759	
WOOD GREEN JUNIOR	1,050,123	0	(0 0	3,069	0	-6,415	-7,302	-3,297	0	1,036,178	241	1,152,799	0	0	0	14,642	0	-6,415	-10,317	-3,733	0	1,146,977	272	128,300	1,275,277	6,621	1 7,060	0 439	1,282,337	31 10.699	% 116,04
YEW TREE JR & INF	2,352,145	148,599	(0 0	78,365	0	-12,258	-16,967	-7,662	0	2,542,221	560	2,403,433	128,934	0	0	103,472	0	-12,258	-21,809	-7,892	0	2,593,879	575	286,320	2,880,199	10,410	0 10,469	9 5	2,890,668	15 2.039	% 324,83
PRIMARY TOTAL 1	146,754,909	8,344,253	418,808	8 0	3,242,922	1,626,585	-637,387	-811,739	-366,561	-731,008	157,840,783	33,284	148,231,958	8,012,653	523,629	0	3,774,768	1,720,861	-637,387	-1,008,900	-365,112	-760,249	159,492,221	33,715	11,434,160	170,926,381	554,844	4 541,61	6 -13,22	171,467,997	431	19,373,56

TABLE A: 2019-20 SCHOOL BUDGETS - MAINSTREAM SCHOOLS

																											DEVO	VED FO	A IIIMS				
						204	0.40											204	0.00									CAPITAL	····OE/		CHAN	NOT	MEMO
			,			201	8-19											201	9-20									CAPITAL			CHAN	NGE	MEMO
SCHOOLS	DSG (£)	EARLY YEARS (£)	MINIMUM FUNDING GUARANTEE (£)	POST 16 FUNDING (£)	HIGH NEEDS FUNDING NON FOCUS PROVISION (£)	HIGH NEEDS FUNDING FOCUS PROVISION (£)	EQUAL VALUE PAY CLAIM (10/15) (£)	DELEGATED	EDUCATION FUNCTIONS (£)	PFI (£)	TOTAL (£)	PUPIL NUMBERS	DSG (£)	EARLY YEARS (£)	MINIMUM FUNDING GUARANTEE (£)	POST 16 FUNDING (£)	HIGH NEEDS FUNDING NON FOCUS PROVISION (£)	FOCUS	EQUAL VALUE PAY CLAIM (£) (11/15)	DE-DELEGATED FUNDING (£)		PFI	TOTAL (£)	PUPIL NUMBERS	ILLUSTRATIVE PUPIL PREMIUM 2019-20 (£)	TOTAL SCHOOLS REVENUE FUNDING 2019/20 (£)	2018-19 (£)	2019-20 (£)	DIFF(£)	TOTAL SCHOOLS FUNDING INC DFC 2019/20 (£)	PUPIL FI NUMBERS		NOTIONAL SEN BUDGET 2019-20 (£)
	i		i				i	•				i			•						•						i	i					
Q3 TIPTON ACADEMY (ACE ACADEMY)	7.419.106	(0	0	63.575	0	-28.863	0	ol	ol	7.453.818	1.346	7.002.365	l o	l 0	0	46,450	0	-28.863	0	0	I 0	7.019.953	1,269	0	7.019.953	0	0	0	7.019.953	-77	-5.82%	804,560
BRISTNALL HALL ACADEMY	5,202,771	(0	0	310.354	260.710	-19,147	0	0	0	5,754,687	933	5,204,285	0	6.919	0	334,367	264,550	-19,147	0	0	0	5,790,973	940	0	5,790,973	0	0	0	5,790,973	7	0.63%	652.26
GEORGE SALTER ACADEMY	5,598,859	(0	0	77,496	0	0	0	0	0	5,676,355	1.028	5,472,832	0	0	0	70,140	0	0	0	0	0	5,542,972	1.006	0	5,542,972	0	0	0	5,542,972	-22	0.00%	652,267 543,742 825,467
HOLLY LODGE HIGH	7,497,307	(37.255	0	79,599	0	-26.156	-20.290	-18.471	0	7,549,244	1,350	7,422,831	0	40,401	0	86,652	0	-26.156	-29,421	-18.448	0	7,475,860	1.344	558.195	8,034,055	28,891	27.423	-1.468	8,061,478	-6	-0.97%	825.46
OLDBURY ACADEMY (OCOS)	7.845.377	(0	0	74,616	0	0	0	0	0	7,919,993	1.465	7.704.515	0	0	0	62.805	0	0	0	0	0	7,767,320	1.438	0	7,767,320	0	0	0	7,767,320	-27	-1.93%	807.85
ORMISTON ACADEMY	5,150,964	(0	0	56,962	0	-18.421	0	0	0	5,189,505	976	5.287.741	0	9.758	0	93.343	0	-18,421	0	0	0	5,372,421	1.010	0	5,372,421	0	0	0	5,372,421	34	3.52%	807,854 509,214
ORMISTON FORGE ACADEMY (HFIELD)	6,532,563	(0	0	113,429	0	0	0	0	0	6,645,992	1.218	7.044.836	0	0	0	119,987	0	0	0	0	0	7,164,822	1.315	0	7,164,822	0	0	0	7,164,822	97	7.81%	752,479
PERRYFIELDS HIGH	5.813.807	(0	0	25.783	0	-18.272	-16.758	-15.256	0	5.789.304	1.115	5.678.223	0	0	0	21.795	0	-18.272	-23.751	-14.893	0	5,643,102	1.085	307.410	5,950,512	25.887	22.377	-3.510	5,972,889	-30	-2.53%	468,165
PHOENIX COLLEGIATE HIGH	8.059.425	(0	0	98.852	0	-29.668	-21.342	-19.429	0	8.087.838	1.420	8.919.436	0	85.760	0	71.684	0	-29.668	-33,908	-21,262	0	8,992,041	1.549	618,465	9,610,506	30,612	31,412	800	9,641,918	129	11.18%	1,056,832
Q3 ACADEMY (DARTMOUTH)	4,822,673	(0	0	126,659	0	0	0	0	0	4,949,332	953	4.947.766	0	0	0	116,550	0	0	0	0	0	5,064,315	980	0.0,.00	5,064,315	0.00	0.,0	0	5,064,315	27	2.32%	371,993
Q3 LANGLEY ACADEMY	2,779,892	(172,699	0	66.249	0	0	0	0	0	3,018,840	528	3.986.345	0	208.420	0	98.664	0		0	0	0	4,293,429	775	0	4,293,429	0	0		4,293,429	247	0.00%	276.39
RSA ACADEMY (WILLINGSWTH)	5.087.354	(0	0	73,673	0	0	0	0	0	5,161,026	946	5.391.930	0	0	0	59,654	0	0	0	0	0	5,451,583	1.000	0	5,451,583	0	0	0	5,451,583	54	5.63%	276,391 465,193 346,513 651,687 671,084
SANDWELL ACADEMY	4.882.040	(0	0	61 080	0	0	0	0	0	4,943,120	958	4.948.931	0	0	0	56 163	0	0	0	0	0	5,005,094	967	0	5,005,094	0	0	0	5,005,094	9	0.00%	346 51
SHIRELAND COLLEGIATE ACADEMY	5,440,996	(32.582	0	61,281	0	0	0	0	0	5,534,859	966	5.852.358	0	29.530	0	47,172	0	0	0	0	0	5,929,060	1.046	0	5,929,060	0	0	0	5,929,060	80	0.00%	651.68
ST MICHAELS CE HIGH	6.915.028	() 0	0	196,404	423,653	-21.730	-18.050	-16.432	-468.415	7,010,457	1.201	6.776.768	0	0	0	147,955	358.711	-21.730	-25.765	-16.156	-480.125	6,739,658	1,177	439.580	7,179,238	0	0	0	7,179,238	-24	-3.86%	671.08
STUART BATHURST	3,922,084	(0	0	69.833	0	0	-10.821	-9.851	0	3,971,245	720	3.959.729	0	0	0	50.145	0	0	-16.155	-10.130	0	3,983,589	738	272.385	4,255,974	. 0	0	0	4,255,974	18	0.31%	405,070
WEST BROMWICH COLLEGIATE ACADEMY	0	(0	0	0	0	0	0	0	0	0	0	663,791	0	0	0	0	0	-	0	0	0	663,791	102	0	663,791	0	0	0	663,791	102	0.00%	56.13
WODENSBOROUGH ORMISTON ACADEMY	4.982.950	(0	0	113.915	171.703	-23.043	0	0	0	5.245.525	885	5.360.880	0	0	0	90.350	194.882	-23.043	0	0	0	5,623,069	951	0	5,623,069	0	0	0	5,623,069	66	7.20%	56,136 683,842
WOOD GREEN ACADEMY	6.632.728	(0	0	107.763	0	-28.872	0	0	0	6.711.619	1.259	6.701.770	0	6.593	0	133,837	0	-28.872	0	0	0	6,813,327	1.281	0	6,813,327	0	0	0	6,813,327	22	1.52%	602,602
HEALTH FUTURES UTC	1,628,924	(0	0	0	0	0	0	0	0	1,628,924	283	1.154.308	0	0,000	0	0	0		0	0	0	1,154,308	190	0	1,154,308	0	0	0	1,154,308	-93	0.00%	116,486
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SECONDARY TOTAL	106,214,846	0	242,536	0	1,777,520	856,066	-214,171	-87,261	-79,439	-468,415	108,241,682	19,550	109,481,639	0	387,381	0	1,707,711	818,143	-214,171	-129,000	-80,888	-480,125	111,490,690	20,163	2,196,035	113,686,725	85,389	81,211	-4,178	113,767,936	613		11,067,577
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SCHOOLS BLOCK TOTAL	252,969,755	8,344,253	661,345	0	5,020,442	2,482,651	-851,558	-899,000	-446,000	-1,199,423	266,082,465	52,834	257,713,597	8,012,653	911,010	0	5,482,478	2,539,004	-851,558	-1,137,900	-446,000	-1,240,374	270,982,910	53,878	13,630,195	284,613,105	640,234	622,827	-17,406	285,235,933	1,044		30,441,146

TABLE B: 2019-20 SCHOOL BUDGETS - FACTORS

						DE	PRIVATION												
	AWPU (Primary/KS3)	AWPU (KS4)	TOTAL BASIC ENTITLEMENT	BAND F	BAND E	BAND D	BAND C	BAND B	BAND A	TOTAL IDACI	LOW ATTAINMENT	EAL	TOTAL AEN	LUMP SUM	SPLIT SITE	RATES	PFI	TOTAL SCHOOL SPECIFIC	TOTAL 2019-20
SCHOOLS ABBEY INFANT	807.180		807.180	0	2,215	20,240	2,530	5,570	0	30.555	100,366	51,735	182,656	129,057	0	13,206	0	142,263	1,132,099
ABBEY JUNIOR	1,103,758		1,103,758	0	3,367	31,367	5,581	5,027	0	45,343	155,695	4,230	205,267	129,057	0	17,099	C	146,156	1,455,181
ALBERT PRITCHARD INF	807,180		807,180	0	5,859	51,980	6,578	6,127	0	70,544	98,110	31,369	200,023	129,057	0	16,226	0	145,283	1,152,486
ALL SAINTS JR & INF ANNIE LENNARD INF	1,210,770 721,570		1,210,770 721,570	0	10,888 6.386	7,379 27,717	4,058 15,245	56,958 6.153	1,227	80,510 55,501	183,227 106.967	36,892 13.438	300,628 175,907	129,057 129,057	0	9,215	0	129,057 138,272	1,640,455 1,035,748
BEARWOOD JR & INF	1,284,150		1,284,150	0	5,169	29,581	14,236	31,341	3,690	,	192,543	84,882	361,441	129,057	0	22,520	0	151,577	1,797,169
BLACKHEATH JR & INF	1,360,588		1,360,588	0	1,286	49,680	83,490	38,990	1,224	174,670	185,056	15,727	375,453	129,057	0	61,118	216,661	406,835	2,142,876
BLEAKHOUSE JUNIOR	733,800		733,800	0	2,715	8,280	16,698	7,241	612	,	132,236	4,230	172,012	129,057	0	11,955	0	141,012	1,046,824
BRANDHALL JR & INF	1,201,598		1,201,598	0	1,429	18,860	81,972	12,254	1,224		202,027	29,033	346,799 199,449	129,057 129.057	0	26,279	0	155,336	1,703,733
BRICKHOUSE JR & INF BURNT TREE JR & INF	639,018 1,119,045		639,018 1,119,045	0	1,371 572	2,787 53,360	28,610 3,036	53,989 25,622	1,224	86,756 83,814	106,799 181,475	5,894 56,832	322,121	129,057	0	13,345 30,717	0	142,402 159,774	980,868 1,600,939
CAPE JR & INF	1,825,328		1,825,328	0	3,358	84,180	111,826	22,837	48,960	271,161	391,174	107,747	770,082	129,057	0	19,956	0	149,013	2,744,422
CAUSEWAY GREEN JR & INF	1,268,863		1,268,863	0	721	65,027	45,472	16,310	0	127,531	234,281	40,435	402,246	129,057	0	19,893	0	148,950	1,820,059
CHRIST CHURCH JR & INF	1,271,920		1,271,920	0	2,644	28,520	17,204	93,576	612	,	245,860	48,036	436,451	129,057	0	4,917	0	133,974	1,842,345
CORNGREAVES PRIMARY CROCKETTS LANE PRIMARY	651,248 1.351,415		651,248 1,351,415	0	6,145 7.161	13,800 55.786	2,530 81.651	35,648 13.957	4.294	58,123 162,848	76,828 277.870	9,793 93,727	144,744 534,446	129,057 129,057	0	2,500 56.712	0	131,557 185,769	927,549 2,071,630
DEVONSHIRE INF ACADEMY	831.640		831.640	0	5,502	11.500	22.264	2,785	612	42.663	154.765	145.985	343,413	129,057	0	5,769	0	134.826	1,309,879
DEVONSHIRE JR ACADEMY	1,115,988		1,115,988	0	7,860	21,160	37,950	2,228	1,224	,	253,593	8,460	332,475	129,057	0	0	0	129,057	1,577,519
EATON VALLEY JR & INF	1,274,978		1,274,978	0	5,073	22,080	4,554	61,827	1,836	95,370	195,269	65,840	356,479	129,057	0	55,972	0	185,029	1,816,485
FERNDALE JR & INF	1,703,028		1,703,028	0	3,578	13,634	25,340	12,524	0 450	55,076	288,286	41,352	384,714	129,057	0	41,273	004.005	170,330	2,258,071
GALTON VALLEY PRIMARY GEORGE BETTS PRIMARY ACADEMY	1,363,645 1,247,460		1,363,645 1,247,460	0	3,804 7.216	148,325 13.800	13,724 80,960	3,917 32,306	2,459	172,228 134,282	228,529 234.020	103,615 86,785	504,372 455,088	129,057 129,057	0	74,455 4,165	224,335	427,847 133,222	2,295,864 1,835,770
GLEBEFIELDS JR & INF	1,213,828		1,213,828	0	574	18,031	23,902	71,657	88,574	202,739	226,098	12,547	441,384	129,057	0	30,086	0	159,143	1,814,355
GRACE MARY JR & INF	736,858		736,858	0	286	7,360	4,048	71,296	0	82,990	118,950	10,629	212,569	129,057	0	17,496	0	146,553	1,095,979
GREAT BRIDGE JR & INF	1,354,473		1,354,473	0	716	42,877	20,793	41,870	3,067	109,322	282,308	54,655	446,285	129,057	0	56,828	219,899	405,784	2,206,542
GROVE VALE JR & INF HANBURY PRIMARY	1,287,208		1,287,208	0	1,504 4.534	11,988	6,086 43,322	7,817	0	27,396	177,280	51,304	255,980	129,057	0	24,229	0	153,286	1,696,473
HALL GREEN JR & INF	1,274,978 1,287,208		1,274,978 1,287,208	0	3.967	25,483 13.932	43,322 8,685	100,425 151,270	0	173,764 177,855	227,198 248,146	71,149 21,705	472,112 447,706	129,057 129,057	0	43,881 63,423	0	172,938 192,480	1,920,028 1,927,393
HAMSTEAD INF	525,890		525,890	0	2,644	16,100	8,602	4,456	0	31,802	63,790	41,756	137,347	129,057	0	10,676	0	139,733	802,970
HAMSTEAD JUNIOR	721,570		721,570	0	2,942	27,255	10,163	5,594	0	45,954	98,618	5,076	149,648	129,057	0	10,676	0	139,733	1,010,952
HARGATE JR & INF	1,290,265		1,290,265	0	13,933	14,260	7,590	64,055	1,224	. ,	186,545	53,256	340,862	129,057	0	33,333	0	162,390	1,793,517
HARVILLS HAWTHORN PR HATELEY HEATH PRIM	1,366,703		1,366,703	0	3,947	10,165	6,608 12,681	101,830 32,944	1,230	123,780	232,572	38,011	394,363 357,320	129,057 129.057	0	66,763	0	195,820	1,956,885 1,754,895
HIGHFIELDS JR & INF	1,247,460 1,271,920		1,247,460 1,271,920	0	15,185 2,865	14,756 24.900	38,549	32,944 11,725	1,227	76,793 78,039	217,506 168,427	63,022 14.829	261,294	129,057	0	21,057 20,713	0	150,114 149,770	1,754,895
HOLY NAME RC JR & INF	608,443		608,443	0	1,077	2,774	3,051	2,799	0	9,702	81,736	6,932	98,370	129,057	0	0	0	129,057	835,870
HOLY TRINITY JR & INF	1,262,748		1,262,748	0	8,421	29,655	9,175	30,298	4,315	81,864	239,223	101,090	422,177	129,057	0	36,208	0	165,265	1,850,190
HOLYHEAD PRIMARY ACADEMY	614,558		614,558	0	2,944	9,246	47,293	6,158	1,845		125,324	18,151	210,961	129,057	0	5,632	0	134,689	960,208
JOSEPH TURNER JR & INF JUBILEE PARK ACADEMY	1,223,000 599.270		1,223,000 599,270	0	500 431	18,400 7,398	55,660 7,120	84,107 40.310	28,764 46,751	187,431 102,009	237,751 100.934	14,842 11.636	440,025 214,579	129,057 129,057	0	29,782 2.640	0	158,839 131,697	1,821,864 945,546
KING GEORGE V PRIMARY	648.190		648.190	0	1.143	51.520	4.554	15.039	40,731	72,256	111.300	24.772	208.329	129,057	0	10,843	0	131,697	996,419
LANGLEY JR & INF	1,265,805		1,265,805	0	3,231	40,214	16,271	24,067	0	83,783	211,313	42,808	337,903	129,057	0	21,839	0	150,896	1,754,605
LIGHTWOODS JR & INF	923,365		923,365	0	436	2,806	3,087	1,133	0	7,462	135,804	10,558	153,824	129,057	129,057	25,442	0	283,556	1,360,746
LODGE JR & INF	1,232,173		1,232,173	0	6,002	51,060	18,722	61,827	0	137,611	221,820	108,567	467,998	129,057	0	12,789	0	141,846	1,842,017
LYNG JUNIOR & INF MESTY CROFT ACADEMY	1,360,588 1,262,748		1,360,588 1,262,748	0	2,501 4,859	18,400 11,960	11,132 48,576	121,983 24,508	1,224 612	,	228,016 173,867	78,025 18,543	461,281 282,925	129,057 129,057	0	25,019 4,988	0	154,076 134,045	1,975,945 1,679,717
MOAT FARM INF	1,112,930		1,112,930	0	5,087	29,060	12,685	38,539	614		159,643	55,531	301,158	129,057	0	21,269	0	150,326	1,564,414
MOAT FARM JUNIOR	1,464,543		1,464,543	0	5,370	47,479	18,761	51,351	1,840	124,801	272,799	5,076	402,676	129,057	0	20,595	0	149,652	2,016,871
MOORLANDS JR & INF	642,075		642,075	0	5,002	16,100		8,912	0	61,386	85,750	14,805	161,941	129,057	0	7,954	0	137,011	941,026
NEWTOWN JR & INF OAKHAM JR & INF	611,500 1,287,208		611,500 1,287,208	0	143 859	56,120 1,383	3,542 2,536	31,749 75,374	1,836	93,390 80,153	108,394 161,255	16,627 12,826	218,410 254,234	129,057 129,057	0	12,372 20,608	0	141,429 149,665	971,340 1,691,106
OCKER HILL INFANTS	553,408		553,408	0	286	6,900		17,824	23.868	54,444	70,803	17,865	143,111	129,057	0	10,426	0	139,483	836,002
OCKER HILL ACADEMY	767,433		767,433	0	1,000	5,520	5,566	33,420	25,704	,	_	1,692	189,313	129,057	0	3,009	0	132,066	1,088,811
OLD HILL JR & INF	648,190		648,190	0	4,451	25,420	-, -	25,184	615	,	92,008	14,863	175,759	129,057	0	14,457	0	143,514	967,464
OLD PARK JR & INF	1,372,818		1,372,818	0	19,363	27,600	12,650	5,013	1,224	,	_	15,705	270,626	129,057	0	27,028	0	156,085	1,799,528
PARK HILL JR & INF PENNYHILL PRIMARY	666,535 1,965,973		666,535 1,965,973	0	9,834 8,583	1,848 15,323	1,525 7.661	8,394 144.497	615 618	22,216 176,682	110,553 291,731	4,905 43,204	137,674 511,618	129,057 129,057	0	12,928 27,873	0	141,985 156,930	946,194 2,634,521
PERRYFIELDS JR & INF	1,174,080		1,174,080	0	1,379	13,552	57,058	7,356	1,865		151,460	17.666	250.336	129,057	0	22,919	0	151,976	1,576,392
PRIORY PRIMARY	895,848		895,848	0	2,215	3,220	7,084	121,426	0	133,945	117,605	29,040	280,590	129,057	0	32,532	C	161,589	1,338,027
REDDAL HILL JR & INF	1,180,195		1,180,195	0	14,221	26,819	6,104	40,873	0	88,016	229,037	38,476	355,529	129,057	0	13,762	C	142,819	1,678,544
ROOD END JR & INF	1,415,623 1,204,655		1,415,623 1,204,655	0	6,616	44,448 18,494	18,335 8,646	97,550 57,664	616 1,845		273,261 218,414	126,446 59,385	567,272 365,382	129,057 129.057	0	15,014 19,583	0	144,071 148,640	2,126,965 1,718,677
ROUNDS GREEN JR & INF ROWLEY HALL JR & INF	1,904,823		1,204,655	0	934 1,715	75,900	,	66,283	1,645	214,232	274,978	21,755	510,965	129,057	0	48,854	0	177,911	2,593,699
RYDERS GREEN JR & INF	1,271,920		1,271,920	0	4,073	19,780		135,908	3,672		207,726	73,730	456,020	129,057	0	16,822	0	145,879	1,873,819
SACRED HEART JR & INF	905,020		905,020	0	1,786	66,700	,	10,583	1,224	,	172,828	76,258	341,018	129,057	0	31,667	0	160,724	1,406,762
SHIRELAND HALL PRIMARY ACADEMY	1,926,225		1,926,225	0	4,573	125,580	88,044	25,622	13,464	,	378,685	108,570	744,538	129,057	0	25,458	C	154,515	2,825,278
SHIRELAND HIGH TECH PRIMARY SPRINGFIELD PRIMARY	107,013 1,278,035		107,013 1,278,035	0	413 8,236	2,836 5,533	2,463 48,185	3,573 47,459	666 613	,	237.790	4,039 1,987	13,990 349,803	75,283 129,057	0	5,000 25,134	0	80,283 154,191	201,286 1,782,030
ST FRANCIS XAVIER SCHOOL	648,190		1,278,035	0	728	11,252	48,185 8,767	46,552	624	,	237,790 110,264	1,987	196,911	129,057	0	3,139	0	132,196	977,297
ST GREGORY'S RC PRIMARY	724,628		724,628	0	2,644	19,780	17,204	5,570	0	45,198	99,207	28,090	172,494	129,057	0	2,525	0	131,582	1,028,703
OUR LADY AND ST HUBERTS	1,033,435		1,033,435	0	1,290	19,377	23,853	7,821	0	52,341	132,435	10,323	195,099	129,057	0	-9,980	C	119,077	1,347,611
ST JAMES CE PRIMARY	1,336,128		1,336,128	0	501	18,903	68,467	105,514	0	193,386	242,640	34,598	470,624	129,057	0	19,548	0	148,605	1,955,356
ST JOHN BOSCO JR & INF ST JOHN'S C OF E ACADEMY	654,305 642,075		654,305 642,075	0	7,107 3,715	11,092 8,280	7,626 14,168	25,742 7,798	612	51,567 34,573	96,817 100,042	24,598 26,356	172,982 160,971	129,057 129,057	0	2,312	0	129,057 131,369	956,344 934,415
ST JOHN'S C OF E ACADEMY ST MARGARETS JR & INF	632,903		632,903	0	1,358	4,600		1,114	012	12,638	71,822	19,788	104,247	129,057	0	2,312	0	131,369	934,415 866,207
ST MARTINS JR & INF	642,075		642,075	0	357	28,060	7,084	2,785	1,224	,	,	27,636	159,571	129,057	0	8,869	0	137,926	939,572
ST MARY MAG JR & INF	642,075		642,075	0	3,072	4,140	,	23,951	0	33,693	113,190	13,818	160,701	129,057	0	7,915	C	136,972	939,748
ST MARY'S JR & INF	660,420		660,420	0	4,787	15,640	,	12,254	0	58,487	104,056	16,702	179,245	129,057	0	0	0	129,057	968,722
ST MATTHEWS JR & INF ST PAULS C OF E ACADEMY	840,813 635,960		840,813 635,960	0	1,004 1,572	40,166 10,120	39,612 44,022	2,795 13,925	49,753 16,524	,	157,544 72,386	78,973 6,920	369,847 165,469	129,057 129,057	0	5,083	0	129,057 134,140	1,339,716 935,570
OT A VOLO O OF L MONDEINT	033,300		030,800	U	1,372	10,120	44,022	13,923	10,324	00,103	12,300	0,920	103,409	129,037	U	3,003	U	134,140	930,070

TABLE B: 2019-20 SCHOOL BUDGETS - FACTORS

						DE	PRIVATION												
	AWPU (Primary/KS3)	AWPU (KS4)	TOTAL BASIC ENTITLEMENT	BAND F	BAND E	BAND D	BAND C	BAND B	BAND A	TOTAL IDACI	LOW ATTAINMENT	EAL	TOTAL AEN	LUMP SUM	SPLIT SITE	RATES	PFI	TOTAL SCHOOL SPECIFIC	TOTAL 2019-20
ST PHILIPS CATHOLIC PRIMARY SCHOOL	654.305		654.305	0	004	04.000	35.586	7.835	07.000	95,984	400,000	04.400	050.050	400.057	0	0.400	0	424.040	4 044 705
			/	0	861	24,032	,	,	27,669	/	128,828	34,438	259,250	129,057	0	2,183	0	131,240	1,044,795
SUMMERHILL PRIMARY	2,290,068		2,290,068	0	2,289	32,704	87,655	87,566 163.505	120,112	330,326	370,403	52,172	752,902	129,057	0	19,325	0	148,382	3,191,351
TAMESIDE PRIMARY ACADEMY	1,644,935		1,644,935	0	7,874	12,443	21,799	,	0	205,621	292,274	31,776	529,671	129,057	0	30,460	0	159,517	2,334,123
TEMPLE MEADOW JR & INF	1,180,195		1,180,195	0	11,089	19,935	28,558	37,611	617	97,810	177,501	26,658	301,969	129,057	0	24,455	0	153,512	1,635,675
TIMBERTREE JR & INF	635,960		635,960	0	9,217	5,060	1,518	9,469	0	25,264	104,236	3,932	133,433	129,057	0	1,566	0	130,623	900,015
TIPTON GREEN JUNIOR	1,091,528		1,091,528	0	6,788	57,040	35,420	10,026	4,896	114,170	256,945	5,922	377,036	129,057	0	45,460	0	174,517	1,643,080
TIVIDALE COMMUNITY	1,287,208		1,287,208	0	357	69,920	4,554	16,153	0	90,984	217,457	55,250	363,691	129,057	0	23,482	0	152,539	1,803,437
TIVIDALE HALL JR & INF	1,278,035		1,278,035	0	2,215	11,960	2,024	41,775	612	58,586	174,068	16,746	249,400	129,057	0	32,851	0	161,908	1,689,342
UPLANDS PRIMARY	2,614,163		2,614,163	0	13,864	159,459	73,639	37,153	7,422	291,537	468,202	139,658	899,397	129,057	0	-2,948	0	126,109	3,639,669
SILVERTREES	801,065		801,065	0	6,573	35,420	21,252	8,355	3,672	75,272	132,485	48,407	256,164	129,057	0	6,954	0	136,011	1,193,240
VICTORIA PARK PRIMARY ACADEMY	1,678,568		1,678,568	0	2,868	83,564	68,052	39,692	50,367	244,544	314,056	100,531	659,132	129,057	0	5,777	0	134,834	2,472,533
WARLEY INFANTS	528,948		528,948	0	1,940	6,940	7,125	5,042	616	21,663	53,850	22,608	98,121	129,057	0	27,096	99,354	255,507	882,576
WEDNESBURY OAK ACADEMY	1,241,345		1,241,345	0	2,513	29,123	25,425	83,964	28,291	169,317	181,386	7,942	358,645	129,057	0	4,577	0	133,634	1,733,624
WHITECREST JR & INF	645,133		645,133	0	71	920	2,024	557	0	3,572	64,254	16,766	84,592	129,057	0	11,399	0	140,456	870,181
WOOD GREEN JUNIOR	831,640		831,640	0	5,430	47,840	7,084	10,026	0	70,380	98,445	1,698	170,524	129,057	0	21,578	0	150,635	1,152,799
YEW TREE JR & INF	1,758,063		1,758,063	0	8,002	65,320	75,900	21,166	5,508	175,896	280,858	24,022	480,777	129,057	0	35,536	0	164,593	2,403,433
PRIMARY TOTAL	103,083,613	0	103,083,613	0	395,188	2,738,291	2,327,603	3,514,622	647,449	9,623,153	16,967,780	3,615,400	30,206,334	12,206,641	129,057	1,846,065	760,249	14,942,012	148,231,958
Q3 TIPTON ACADEMY (ACE ACADEMY)	3,376,034	2,081,529	5,457,563	0	42,944	188,391	148,502	203,685	138,747	722,269	623,993	28,243	1,374,505	129,057	0	41,241	0	170,298	7,002,365
BRISTNALL HALL ACADEMY	2,434,185	1,608,454	4,042,639	0	61,464	160,918	99,930	93,712	16,001	432,025	544,261	44,313	1,020,599	129,057	0	11,989	0	141,046	5,204,285
GEORGE SALTER ACADEMY	2,610,513	1,715,971	4,326,484	0	76,911	96,811	55,105	332,815	8,889	570,530	401,109	8,589	980,229	129,057	0	37,062	0	166,119	5,472,832
HOLLY LODGE HIGH	3,496,453	2,283,661	5,780,114	0	73,802	283,019	188,044	109,834	51,542	706,241	648,907	110,760	1,465,907	129,057	0	47,753	0	176,810	7,422,831
OLDBURY ACADEMY (OCOS)	3,573,865	2,610,513	6,184,378	0	50,528	195,840	170,644	181,955	40,044	639,010	648,101	59,101	1,346,213	129,057	0	44,867	0	173,924	7,704,515
ORMISTON ACADEMY	2,687,925	1,655,762	4,343,687	0	8,954	127,234	15,475	192,830	7,132	351,625	421,308	12,270	785,202	129,057	0	29,795	0	158,852	5,287,741
ORMISTON FORGE ACADEMY (HFIELD)	3,573,865	2,081,529	5,655,394	0	155,727	113,390	107,164	204,171	4,440	584,892	606,257	29,515	1,220,663	129,057	0	39,721	0	168,778	7,044,836
PERRYFIELDS HIGH	2,705,128	1,961,110	4,666,238	0	37,045	93,380	132,120	48,420	13,320	324,285	387,094	16,093	727,472	129,057	0	155,457	0	284,514	5,678,223
PHOENIX COLLEGIATE HIGH	4,279,177	2,382,577	6,661,753	0	125,704	110,197	69,085	428,263	8,891	742,141	871,296	64,321	1,677,758	129,057	0	450,867	0	579,924	8,919,436
Q3 ACADEMY (DARTMOUTH)	2,705,128	1,509,539	4,214,666	0	37,770	90,137	61,719	22,619	889	213,134	318,709	11,157	543,000	129,057	0	61,043	0	190,100	4,947,766
Q3 LANGLEY ACADEMY	2,683,624	649,403	3,333,027	0	37,258	91,174	67,187	65,005	0	260,624	211,235	1,524	473,383	129,057	0	50,877	0	179,934	3,986,345
RSA ACADEMY (WILLINGSWTH)	2,851,351	1,449,329	4,300,680	0	33,682	70,175	109,585	213,475	164,609	591,527	317,312	4,913	913,752	129,057	0	48,441	0	177,498	5,391,930
SANDWELL ACADEMY	2,619,114	1,539,643	4,158,758	0	49,445	86,800	108,010	88,054	7,111	339,419	261,658	2,454	603,532	129,057	0	57,585	0	186,642	4,948,931
SHIRELAND COLLEGIATE ACADEMY	2,812,645	1,685,867	4,498,511	0	35,707	243,020	166,777	94,509	93,329	633,344	493,351	60,296	1,186,991	129,057	0	37,799	0	166,856	5,852,358
ST MICHAELS CE HIGH	3,083,588	1,978,313	5,061,900	0	32,243	114,724	176,894	218,697	888	543,446	535,222	27,017	1,105,685	129,057	0	0	480,125	609,182	6,776,768
STUART BATHURST	1,948,208	1,225,694	3,173,902	0	56,483	78,358	66,330	126,406	11,591	339,167	320,278	11,043	670,488	129,057	0	-13,718	0	115,339	3,959,729
WEST BROMWICH COLLEGIATE ACADEMY	439,028	0	439,028	0	5,617	12,331	10,174	15,612	2,990	46,724	44,455	3,301	94,480	75,283	0	55,000	0	130,283	663,791
WODENSBOROUGH ORMISTON ACADEMY	2,700,827	1,389,120	4,089,947	0	60,280	59,614	115,725	269,866	8,026	513,511	555,465	47,121	1,116,097	129,057	0	25,780	0	154,837	5,360,880
WOOD GREEN ACADEMY	3,311,524	2,197,647	5,509,171	0	134,803	159,413	130,652	117,015	7,104	548,987	465,355	22,103	1,036,446	129,057	0	27,096	0	156,153	6,701,770
HEALTH FUTURES UTC	0	817,129	817,129	0	7,586	24,139	22,874	38,130	9,820	102,549	90,849	14,724	208,122	129,057	0	0	0	129,057	1,154,308
SECONDARY TOTAL	53,892,179	32,822,790	86,714,969	0	1,123,953	2,399,065	2,021,997	3,065,071	595,363	9,205,449	8,766,215	578,859	18,550,523	2,527,366	0	1,208,655	480,125	4,216,147	109,481,639
20112012121	450.055.55		400 -00	_	4.545.4			0.550		40.000.000		1 10 1 05 -	40 === 0==	44-64-6	100.05=	0.004.00	4.040.05	10 150 150	.====:=
SCHOOLS TOTAL	156,975,792	32,822,790	189,798,582	0	1,519,141	5,137,356	4,349,600	6,579,693	1,242,812	18,828,603	25,733,995	4,194,259	48,756,857	14,734,008	129,057	3,054,720	1,240,374	19,158,158	257,713,597

TABLE C: 2019-20 SCHOOL BUDGETS - FACTORS

		BAS	IC ENTITLEMEN	NT					ID	ACI				l L	OW ATTAINN	IENT		EAL				LUMP SUM		S	PLIT SITE			RATES			PFI		T	
	2018/19	AWPU	AWPU (KS4)	2019/20	DIFFERENC	2018/19	BAND E	BAND D	BAND C	BAND B	BAND A	2019/20	DIFFERENC	2018/19	2019/20	DIFFERENC	2018/19	2019/20	DIFFEREN	TOTAL AEN	2018/19	2019/20	DIFFERENC			EREN 20°	8/19	2019/20 DI	IFFERENC	2018/19	2019/20	DIFFERENC	TOTAL SCHOOL TO	OTAL 2019-20
SCHOOLS ABBEY INFANT		(Primary/KS3)	7 o (1o)	907 190	E 47.654						0		E 2.470			E 4 270			CE	182.656			E	20.01.0	0	CE 20	14 600		E 4 402	2010/10	2010/20	E	SPECIFIC 142,263	
ABBEY JUNIOR	824,834 1,111,998	807,180 1,103,758		1,103,758	-8,241	28,076 48,688	2,215 3,367	31,367	2,530 5,581	5,570 5,027	0	30,555 45,343	2,479 -3,345	104,644 138,223	100,36 155,69	5 17,472	48,222 4,242	51,73 4,23	30 -12	205,267	129,057 129,057	129,057 129,057	0	0	0		17,771	13,206 17,099	-1,403	0	0	0	146,156	1,132,099 1,455,181
ALBERT PRITCHARD INF ALL SAINTS JR & INF	800,394 1,124,218	807,180 1,210,770		807,180 1,210,770	6,786 86,552	72,967 69,055	5,859 10,888	7,379	6,578 4,058	6,127 56,958	1,227	70,544 80,510	-2,423 11,454	98,473 161,375	98,11 183,22	7 21,852		31,36 36,89	92 1,628	200,023 300,628	129,057 129,057	129,057 129,057	0	0	0	0	20,838	16,226 0	-4,611 0	0	0	0	145,283 129,057	1,152,486 1,640,455
ANNIE LENNARD INF BEARWOOD JR & INF	745,405 1,292,240	721,570 1,284,150		721,570 1,284,150	-23,835 -8,090	59,857 89,515	6,386 5,169		15,245 14,236	6,153 31,341	3,690	55,501 84,016	-4,356 -5,499	104,536 183,703	106,96 192,54		7,717 94,640	13,43 84,88		175,907 361,441	129,057 129,057	129,057 129,057	0	0	0		19,101 24,912	9,215 22,520	-9,886 -2,392	0	0	0	138,272 151,577	1,035,748 1,797,169
BLACKHEATH JR & INF BLEAKHOUSE JUNIOR	1,359,448 730,131	1,360,588 733,800		1,360,588 733,800	1,139 3,669	172,745 31.662	1,286 2,715		83,490 16,698	38,990 7,241	1,224 612	174,670 35,546	1,925 3,884	183,749 127,028	185,05 132,23		15,646 5.922	15,72 4,23		375,453 172,012	129,057 129,057	129,057 129,057	0	0	0		59,431 12,589	61,118 11,955	1,687 -634	208,327	216,661	8,333	406,835 141,012	2,142,876 1,046,824
BRANDHALL JR & INF BRICKHOUSE JR & INF	1,258,635 614,043	1,201,598 639,018		1,201,598 639,018	-57,038 24,975	124,579 84,029	1,429 1,371	18,860	81,972 28,610	12,254 53,989	1,224	115,739 86,756	-8,840 2,727	209,451 100,055	202,02 106,79	7 -7,425	33,572 4,915	29,03 5,89	33 -4,538	346,799 199,449	129,057 129,057	129,057 129,057	0	0	0	0	31,617 14,763	26,279 13,345	-5,338 -1,417	0	0	0	155,336 142,402	1,703,733 980,868
BURNT TREE JR & INF	1,029,515	1,119,045		1,119,045	89,530	81,703	572	53,360	3,036	25,622	1,224	83,814	2,111	169,151	181,47	5 12,324	69,537	56,83	32 -12,705	322,121	129,057	129,057	0	0	0	0	27,747	30,717	2,970	0	0	0	159,774	1,600,939
CAPE JR & INF CAUSEWAY GREEN JR & INF	1,894,063 1,255,580	1,825,328 1,268,863		1,825,328 1,268,863	-68,735 13,282	284,006 129,639	3,358 721	65,027	111,826 45,472	22,837 16,310	48,960 0	271,161 127,531	-12,845 -2,108	397,645 247,118	391,17 234,28	1 -12,837	126,002 36,445	107,74 40,43		770,082 402,246	129,057 129,057	129,057 129,057	0	0	0		20,875 22,146	19,956 19,893	-919 -2,253	0	0	0	149,013 148,950	2,744,422 1,820,059
CHRIST CHURCH JR & INF CORNGREAVES PRIMARY	1,176,152 662,922	1,271,920 651,248		1,271,920 651,248	95,768 -11,674	134,554 60,384	2,644 6,145		17,204 2,530	93,576 35,648	612	142,556 58,123	8,002 -2,261	222,088 82,356	245,86 76,82		60,759 11,781	48,03 9,79		436,451 144,744	129,057 129,057	129,057 129,057	0	0	0	0	5,588 2,840	4,917 2,500	-671 -340	0	0	0	133,974 131,557	1,842,345 927,549
CROCKETTS LANE PRIMARY DEVONSHIRE INF ACADEMY	1,252,525 852,328	1,351,415 831,640		1,351,415 831,640	98,890	145,557 41,364	7,161 5,502		81,651 22,264	13,957 2,785	4,294 612	162,848 42,663	17,291 1,299	272,319 174,602	277,87 154,76		106,040 167,874	93,72	27 -12,313	534,446 343,413	129,057 129,057	129,057 129,057	0	0	0		51,038 9,114	56,712 5,769	5,674	0	0	0	185,769 134,826	2,071,630 1,309,879
DEVONSHIRE JR ACADEMY	1,133,383	1,115,988		1,115,988	-17,395	74,020	7,860	21,160	37,950	2,228	1,224 1,836	70,422	-3,599	245,609	253,59	3 7,984	16,920	8,46	60 -8,460	332,475	129,057	129,057	0	0	0	0	-2,542 50.560	0	2,542	0	0	0	129,057	1,577,519
EATON VALLEY JR & INF FERNDALE JR & INF	1,249,470 1,695,492	1,274,978 1,703,028		1,274,978 1,703,028	25,507 7,536	96,047 51,667	5,073 3,578	13,634	4,554 25,340	61,827 12,524	0	95,370 55,076	3,408	189,358 272,928	195,26 288,28	6 15,358	52,394	65,84 41,35	52 -11,042	356,479 384,714	129,057 129,057	129,057 129,057	0	0	0	0	57,573	55,972 41,273	5,412 -16,300	0	0	0	185,029 170,330	1,816,485 2,258,071
GALTON VALLEY PRIMARY GEORGE BETTS PRIMARY ACAD	1,377,778 1,261,690	1,363,645 1,247,460		1,363,645 1,247,460	-14,133 -14,230	173,827 137,458	3,804 7,216		13,724 80,960	3,917 32,306	2,459	172,228 134,282	-1,599 -3,176	222,212 239,820	228,52 234,02		127,833 102,477	103,61 86,78		504,372 455,088	129,057 129,057	129,057 129,057	0	0	0		72,144 4,798	74,455 4,165	2,311 -633	215,707 0	224,335 0	8,628	427,847 133,222	2,295,864 1,835,770
GLEBEFIELDS JR & INF GRACE MARY JR & INF	1,225,031 727,076	1,213,828 736,858		1,213,828 736,858	-11,203 9,782	199,796 81,548	574 286		23,902 4,048	71,657 71,296	88,574 0	202,739 82,990	2,943 1,442	222,518 118,940	226,09 118,95		11,834 13,552	12,54 10,62		441,384 212,569	129,057 129,057	129,057 129,057	0	0	0		43,863 19,336	30,086 17,496	-13,777 -1.840	0	0	0	159,143 146,553	1,814,355 1,095,979
GREAT BRIDGE JR & INF GROVE VALE JR & INF	1,374,723 1,292,240	1,354,473 1,287,208		1,354,473 1,287,208	-20,251	104,894 28,498	716 1,504	42,877	20,793	41,870 7,817	3,067	109,322 27,396	4,428 -1,102	286,993 166,927	282,30	8 -4,685	67,702 44,363	54,65 51,30	55 -13,047	446,285 255,980	129,057 129,057	129,057 129,057	0	0	0	0	49,051 25,568	56,828 24,229	7,778	211,441	219,899	8,458	405,784 153,286	2,206,542 1,696,473
HANBURY PRIMARY	1,276,965	1,274,978		1,274,978	-1,987	175,873	4,534	25,483	43,322	100,425	0	173,764	-2,108	231,922	227,19	8 -4,724	72,310	71,14	49 -1,161	472,112	129,057	129,057	0	0	0	0	44,177	43,881	-1,339	0	0	0	172,938	1,920,028
HALL GREEN JR & INF HAMSTEAD INF	1,261,690 525,450	1,287,208 525,890		1,287,208 525,890	25,517 440	185,342 36,234	3,967 2,644	16,100	8,685 8,602	151,270 4,456	0	177,855 31,802	-7,488 -4,432	231,268 64,381	248,14 63,79	0 -591	41,575	21,70 41,75	56 181	447,706 137,347	129,057 129,057	129,057 129,057	0	0	0	0	9,370	63,423 10,676	1,877 1,306	0	0	0	192,480 139,733	1,927,393 802,970
HAMSTEAD JUNIOR HARGATE JR & INF	727,076 1,173,097	721,570 1,290,265		721,570 1,290,265	-5,506 117,168	41,589 90,297	2,942 13,933		10,163 7,590	5,594 64,055	0 1,224	45,954 101,062	4,365 10,765	92,777 171,854	98,61 186,54		7,614 60,602	5,07 53,25		149,648 340,862	129,057 129,057	129,057 129,057	0	0	0		9,370 30,236	10,676 33,333	1,306 3,096	0	0	0	139,733 162,390	1,010,952 1,793,517
HARVILLS HAWTHORN PR HATELEY HEATH PRIM	1,341,119 1,264,745	1,366,703 1,247,460		1,366,703 1,247,460	25,584 -17,285	120,663 76,557	3,947 15,185	10,165	6,608 12,681	101,830 32,944	1,230 1,227	123,780 76,793	3,116 236	233,795 240,648	232,57	2 -1,223	45,936	38,01 63,02	11 -7,924	394,363 357,320	129,057 129,057	129,057 129,057	0	0	0	0 1	52,022 22,084	66,763 21,057	-85,259 -1,026	0	0	0	195,820 150,114	1,956,885 1,754,895
HIGHFIELDS JR & INF	1,270,855 638,482	1,271,920		1,271,920 608,443	1,065	80,601 7,974	2,865 1,077	24,900	38,549 3,051	11,725	0	78,039 9,702	-2,563	164,505 82,595	168,42 81,73	7 3,922		14,82	29 -1,930	261,294 98,370	129,057 129,057	129,057 129,057 129,057	0	0	0		23,104	20,713	-2,391	0	0	0	149,770 129,057	1,682,985
HOLY NAME RC JR & INF HOLY TRINITY JR & INF	1,203,646	608,443 1,262,748		1,262,748	59,101	71,852	8,421	29,655	9,175	2,799 30,298	4,315	81,864	1,727 10,012	229,952	239,22	3 9,272	95,942	101,09	90 5,148	422,177	129,057	129,057	0	0	0	0	46,418	36,208	-10,211	0	0	0	165,265	835,870 1,850,190
HOLYHEAD PRIMARY ACADEMY JOSEPH TURNER JR & INF	620,153 1,228,086	614,558 1,223,000		614,558 1,223,000	-5,595 -5,086	67,228 185,064	2,944 500		47,293 55,660	6,158 84,107	1,845 28,764	67,486 187,431	258 2,368	121,143 236,786	125,32 237,75		22,832 6,961	18,15 14,84		210,961 440,025	129,057 129,057	129,057 129,057	0	0	0	0	958 36,153	5,632 29,782	4,674 -6,371	0	0	0	134,689 158,839	960,208 1,821,864
JUBILEE PARK ACADEMY KING GEORGE V PRIMARY	580,439 653,757	599,270 648,190		599,270 648,190	18,831 -5.567	97,732 73,682	431 1,143	7,398	7,120 4,554	40,310 15,039	46,751 0	102,009 72,256	4,277 -1,426	83,872 115,015	100,93		15,974 37,390	11,63 24,77		214,579 208,329	129,057 129,057	129,057 129,057	0	0	0	0	2,995 11,486	2,640 10,843	-355 -643	0	0	0	131,697 139,900	945,546 996,419
LANGLEY JR & INF	1,276,965 840,109	1,265,805		1,265,805 923,365	-11,160 93 257	88,320 8,625	3,231 436	40,214	16,271 3,087	24,067 1,133	0	83,783 7,462	-4,537 -1,162	236,581 122,146	211,31 135,80	3 -25,268	36,548 7,540	42,80 10,55	08 6,259	337,903 153,824	129,057 129,057	129,057 129,057	0	0 129.057	0 129.057	0	24,807	21,839	-2,968 -14 202	0	0	0	150,896 283,556	1,754,605 1,360,746
LIGHTWOODS JR & INF LODGE JR & INF	1,267,800	923,365 1,232,173		1,232,173	83,257 -35,628	138,760	6,002	51,060	18,722	61,827	0	137,611	-1,150	230,766	221,82	0 -8,946	123,224	108,56	67 -14,657	467,998	129,057	129,057	0	0	0	0	12,495	25,442 12,789	294	0	0	0	141,846	1,842,017
LYNG JUNIOR & INF MESTY CROFT ACADEMY	1,331,954 1,234,196	1,360,588 1,262,748		1,360,588 1,262,748	28,634 28,552	149,655 83,692	2,501 4,859		11,132 48,576	121,983 24,508	1,224 612	155,240 90,515	5,585 6,822	210,898 171,751	228,01 173,86		70,062 18,823	78,02 18,54		461,281 282,925	129,057 129,057	129,057 129,057	0	0	0		28,181 5,451	25,019 4,988	-3,162 -463	0	0	0	154,076 134,045	1,975,945 1,679,717
MOAT FARM INF MOAT FARM JUNIOR	1,102,833 1,472,481	1,112,930 1,464,543		1,112,930 1,464,543	10,097 -7,939	88,453 123,311	5,087 5,370		12,685 18,761	38,539 51,351	614 1,840	85,984 124,801	-2,468 1,490	171,665 252,351	159,64 272,79		54,492 10,152	55,53 5,07		301,158 402,676	129,057 129,057	129,057 129,057	0	0	0		23,528	21,269 20,595	-2,259 -1,952	0	0	0	150,326 149,652	1,564,414 2,016,871
MOORLANDS JR & INF NEWTOWN JR & INF	638,482 638,482	642,075 611,500		642,075 611,500	3,593	63,020 101,148	5,002 143		31,372 3,542	8,912 31,749	0 1.836	61,386 93,390	-1,635 -7,758	74,560 117,247	85,75 108,39	0 11,190	15,630 14,984	14,80 16,62		161,941 218,410	129,057 129,057	129,057 129,057	0	0	0	0	7,528 12,034	7,954 12,372	426 338	0	0	0	137,011 141,429	941,026 971,340
OAKHAM JR & INF OCKER HILL INFANTS	1,280,020 546,834	1,287,208 553,408		1,287,208 553,408	7,188 6,573	77,306 52,679	859 286	1,383	2,536 5,566	75,374 17,824	23,868	80,153 54,444	2,846 1,765	150,279 76,189	161,25 70,80	5 10,976	15,798 14,117	12,82	26 -2,972	254,234 143,111	129,057 129,057	129,057 129,057	0	0	0	0	23,463	20,608 10,426	-2,855 418	0	0	0	149,665 139,483	1,691,106 836,002
OCKER HILL ACADEMY	763,735	767,433		767,433	3,698	70,600	1,000	5,520	5,566	33,420	25,704	71,210	611	103,734	116,41	0 12,676	3,384	1,69	92 -1,692	189,313	129,057	129,057	0	0	0	0	3,095	3,009	-87	0	0	0	132,066	1,088,811
OLD HILL JR & INF OLD PARK JR & INF	638,482 1,374,723	648,190 1,372,818		648,190 1,372,818	9,708 -1,906	62,842 67,883	4,451 19,363		13,218 12,650	25,184 5,013	615 1,224	68,888 65,850	6,046 -2,033	90,668 199,025	92,00 189,07		8,890 24,404	14,86 15,70		175,759 270,626	129,057 129,057	129,057 129,057	0	0	0		15,993 31,605	14,457 27,028	-1,535 -4,577	0	0	0	143,514 156,085	967,464 1,799,528
PARK HILL JR & INF PENNYHILL PRIMARY	665,977 1,952,107	666,535 1,965,973		666,535 1,965,973	558 13,866	22,196 176,358	9,834 8,583		1,525 7,661	8,394 144,497	615 618	22,216 176,682	20 325	103,837 269,389	110,55 291,73		5,949 63,772	4,90 43,20		137,674 511,618	129,057 129,057	129,057 129,057	0	0	0		13,285 31,661	12,928 27,873	-356 -3,787	0	0	0	141,985 156,930	946,194 2,634,521
PERRYFIELDS JR & INF PRIORY PRIMARY	1,102,833 800,394	1,174,080 895,848		1,174,080 895,848	71,247 95,453	79,593 124,297	1,379 2,215		57,058 7,084	7,356 121,426	1,865	81,209 133,945	1,617 9,648	139,033 112,644	151,46 117,60		20,226 12,666	17,66 29,04	66 -2,559	250,336 280,590	129,057 129,057	129,057 129,057	0	0	0		25,972 27,489	22,919 32,532	-3,053 5,044	0	0	0	151,976 161,589	1,576,392 1,338,027
REDDAL HILL JR & INF	1,050,899	1,180,195		1,180,195	129,296	70,510 177,714	14,221	26,819	6,104	40,873	0	88,016	17,506	197,123	229,03	7 31,914	32,666	38,47	76 5,810	355,529	129,057	129,057	0	0	0	0	15,224	13,762	-1,462	0	0	0	142,819	1,678,544
ROOD END JR & INF ROUNDS GREEN JR & INF	1,472,481 1,209,756	1,415,623 1,204,655		1,415,623 1,204,655	-5,101	94,488	6,616 934	18,494	18,335 8,646	97,550 57,664	1,845	167,565 87,582	-6,905	314,366 205,544	273,26 218,41	4 12,871	131,836 38,204	59,38	85 21,182	567,272 365,382	129,057 129,057	129,057 129,057	0	0	0	0	16,100 22,281	15,014 19,583	-1,086	0	0	0	144,071 148,640	2,126,965 1,718,677
ROWLEY HALL JR & INF RYDERS GREEN JR & INF	1,781,030 1,283,075	1,904,823 1,271,920		1,904,823 1,271,920	123,792 -11,155	198,373 174,956	1,715 4,073		70,334 11,132	66,283 135,908	0 3,672	214,232 174,565	15,859 -391	250,680 205,112	274,97 207,72		17,791 86,856	21,75 73,73		510,965 456,020	129,057 129,057	129,057 129,057	0	0	0		39,617 17,339	48,854 16,822	9,237 -517	0	0	0	177,911 145,879	2,593,699 1,873,819
SACRED HEART JR & INF SHIRELAND HALL PRIMARY ACA	699,581 1,939,887	905,020 1,926,225		905,020 1,926,225	205,439 -13,662	67,222 260,612	1,786 4,573		11,638 88,044	10,583 25,622	1,224 13,464	91,931 257,283	24,709 -3.329	138,240 376,648	172,82 378,68		70,449 134,056			341,018 744,538	129,057 129,057	129,057 129,057	0	0	0		67,948 24,494	31,667 25,458	-36,281 965	0	0	0	160,724 154,515	1,406,762 2,825,278
SHIRELAND HIGH TECH PRIMAR' SPRINGFIELD PRIMARY	1,240,306	107,013 1,278,035		107,013 1,278,035	107,013 37,729	106,107	413 8,236		2,463 48,185	3,573 47,459	666 613	9,951 110,027	9,951 3,920	231,386	237,79	0 0	0 4.978	4,03 1,98		13,990 349,803	129.057	75,283 129,057	75,283 0	0	0	0	0 28,541	5,000 25,134	5,000 -3 407	0	0	0	80,283 154,191	201,286 1,782,030
ST FRANCIS XAVIER SCHOOL	656,812	648,190		648,190	-8,622	64,870	728	11,252	8,767	46,552	624	67,924	3,054	122,129	110,26	4 -11,865	24,580	18,72	24 -5,856	196,911	129,057	129,057	0	0	0	0	3,066	3,139	74	0	0	0	132,196	977,297
ST GREGORY'S RC PRIMARY OUR LADY AND ST HUBERTS	742,350 937,867	724,628 1,033,435		724,628 1,033,435	95,568	42,494 42,497	2,644 1,290	19,377	17,204 23,853	5,570 7,821	0	45,198 52,341	2,703 9,844	109,148 122,150	99,20 132,43	5 10,285	25,421 17,948	10,32	23 -7,625	172,494 195,099	129,057 129,057	129,057 129,057	0	0	0	0	3,482	2,525 -9,980	-41,138	0	0	0	131,582 119,077	1,028,703 1,347,611
ST JAMES CE PRIMARY ST JOHN BOSCO JR & INF	1,289,185 650,702	1,336,128 654,305		1,336,128 654,305	46,943 3,603	49,252	501 7,107	11,092	68,467 7,626	25,742	0	193,386 51,567	3,234 2,314	233,348 85,935	96,81	7 10,882	28,556	24,59	98 -3,958	470,624 172,982	129,057 129,057	129,057 129,057	0	0	0	0	20,177	19,548 0	-630 0	0	0	0	148,605 129,057	1,955,356 956,344
ST JOHN'S C OF E ACADEMY ST MARGARETS JR & INF	632,373 641,537	642,075 632,903		642,075 632,903	9,702 -8,635	31,487 13,369	3,715 1,358		14,168 5,566		612 0	34,573 12,638	3,087 -731	94,692 61,670			32,650	26,35	56 -6,294	160,971 104,247	129,057 129,057			0	0	0	2,638	2,312	-326 0	0	0	0	131,369 129,057	934,415 866,207
ST MARTINS JR & INF ST MARY MAG JR & INF	644,592 638,482	642,075 642,075		642,075 642,075	-2,517 3,593	34,904	357 3,072	28,060	7,084 2,530	2,785	1,224	39,510 33,693	4,606 2,630	97,291 108,365	92,42	5 -4,865	24,793	27,63	36 2,844	159,571 160,701	129,057 129,057	129,057		0	0		13,554 8,441	8,869 7,915	-4,685 -527	0	0	0	137,926 136,972	939,572 939,748
ST MARY'S JR & INF	656,812	660,420		660,420	3,608	53,841	4,787	15,640	25,806	12,254	0	58,487	4,646	90,264	104,05	6 13,792	17,794	16,70	02 -1,092	179,245	129,057	129,057	0	0	0	0	0	0	0	0	0	0	129,057	968,722
ST MATTHEWS JR & INF ST PAULS C OF E ACADEMY	748,460 635,428	840,813 635,960		840,813 635,960	92,352 532	81,136	1,004 1,572	10,120	39,612 44,022	13,925	49,753 16,524	133,330 86,163	14,530 5,027	139,456 72,352	72,38	6 34	7,909	6,92	20 -989	369,847 165,469	129,057 129,057	129,057	0	0	0		5,213	5,083	-129	0	0	0	129,057 134,140	1,339,716 935,570
ST PHILIPS CATHOLIC PRIMARY SUMMERHILL PRIMARY	656,812 2,248,436	654,305 2,290,068		654,305 2,290,068	-2,507 41,632	95,733 321,691	861 2,289		35,586 87,655		27,669 120,112	95,984 330,326	251 8,635	128,623 387,132			43,260 47,431			259,250 752,902	129,057 129,057			0	0		2,479 19,592	2,183 19,325	-296 -267	0	0	0	131,240 148,382	1,044,795 3,191,351
TAMESIDE PRIMARY ACADEMY TEMPLE MEADOW JR & INF	1,799,360 1,185,317	1,644,935 1,180,195		1,644,935 1,180,195	-154,425 -5.122	220,092 97,299	7,874 11,089	12,443	21,799 28,558	163,505	0 617	205,621 97,810	-14,471 512	297,021 175,603		4 -4,747	35,592		76 -3,816	529,671 301,969	129,057 129,057	129,057 129,057	0	0	0	0	34,599 26,914	30,460 24,455	-4,139 -2,459	0	0	0	159,517 153,512	2,334,123 1,635,675
TIMBERTREE JR & INF	635,428 1,099,778	635,960		635,960 1,091,528	532		9,217	5,060	1,518	9,469	0 4,896	25,264	-485	103,034	104,23	6 1,203	6,920	3,93	32 -2,988	133,433 377,036	129,057 129,057	129,057		0	0	0	2,544 41,266	1,566 45,460	-978	0	0	0	130,623 174,517	900,015
TIPTON GREEN JUNIOR TIVIDALE COMMUNITY	1,273,910	1,091,528 1,287,208		1,287,208	13,298	95,866	6,788 357	69,920	35,420 4,554	16,153	0	90,984	3,795 -4,881	211,747 212,052	217,45	7 5,404	58,140	55,25	50 -2,890	363,691	129,057	129,057	0	0	0	0	25,965	23,482	4,193 -2,483	0	0	0	152,539	1,803,437
TIVIDALE HALL JR & INF UPLANDS PRIMARY	1,280,020 2,651,688	1,278,035 2,614,163		1,278,035 2,614,163	-1,985 -37,525	63,533 295,883	2,215 13,864		2,024 73,639		612 7,422	58,586 291,537	-4,947 -4,346	176,768 452,425	174,06 468,20	2 15,777	16,833 144,907	139,65		249,400 899,397	129,057 129,057	129,057 129,057	0	0	0		34,600 79,094	32,851 -2,948	-1,750 -82,042	0	0	0	161,908 126,109	1,689,342 3,639,669
SILVERTREES VICTORIA PARK PRIMARY ACADI	806,504 1,585,514	801,065 1,678,568		801,065 1,678,568	-5,439 93,054	76,260	6,573 2,868	35,420	21,252 68,052	8,355	3,672 50,367	75,272	-987 10,196	162,646 282,087	132,48	5 -30,160	49,491	48,40	07 -1,084	256,164 659,132	129,057 129,057	129,057 129,057	0	0	0		6,628 6,537	6,954 5,777	326 -760	0	0	0	136,011 134,834	1,193,240 2,472,533
WARLEY INFANTS WEDNESBURY OAK ACADEMY	552,944 1,249,470	528,948 1,241,345		528,948 1,241,345	-23,997	20,958 170,400	1,940 2,513	6,940	7,125 25,425	5,042	616	21,663	705 -1,083	62,538 172,856	53,85	0 -8,688	25,521	22,60	08 -2,913	98,121 358,645	129,057 129,057	129,057	0	0	0	0	23,482	27,096 4.577	3,614	95,533	99,354	3,821	255,507 133,634	882,576 1,733,624
WHITECREST JR & INF	641,537	645,133		645,133	3,595	4,741	71	920	2,024	557	20,291	3,572	-1,169	59,022	64,25	4 5,231	12,903	16,76	66 3,863	84,592	129,057	129,057	0	0	0	0	10,576	11,399	823	0	0	0	140,456	870,181
WOOD GREEN JUNIOR YEW TREE JR & INF	736,241 1,710,766	831,640 1,758,063		831,640 1,758,063	95,399 47,296	65,926 165,112	5,430 8,002		7,084 75,900		5,508	70,380 175,896	4,454 10,785	88,901 281,021				1,69 24,02		170,524 480,777	129,057 129,057	129,057 129,057	0	0	0		29,999 41,043	21,578 35,536	-8,420 -5,506	0	0	0	150,635 164,593	1,152,799 2,403,433
PRIMARY TOTAL	101,680,623	103,083,613	0	103,083,613	1,402,990	9,463,373	395,188	2,738,291	2,327,603	3,514,622	647,449	9,623,153	159,781	16,584,470	16,967,78	0 383,311	3,841,098	3,615,40	00 -225,697	30,206,334	12,131,358	12,206,641	75,283	129,057	129,057	0 2.1	93,923	1,846,065	-347,858	731,008	760,249	29,240	14,942,012	148,231,958
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TABLE C: 2019-20 SCHOOL BUDGETS - FACTORS

		BASI	C ENTITLEMEN	T					IDA	CI				10	W ATTAINMEN	IT		FΔI				LUMP SUM			SPLIT SITE			RATES			PFI		4	
SCHOOLS	2018/19	AW/DII	AWPU (KS4)	2019/20	DIFFERENC E	2018/19	BAND E	BAND D		BAND B	BAND A	2019/20	DIFFERENC E	2018/19		DIFFERENC E	2018/19	2019/20	DIFFEREN CE	TOTAL AEN	2018/19	2019/20	DIFFERENC E	2018/19	DIE	FEREN CE			DIFFERENC E	2018/19	2019/20	DIFFERENC E	TOTAL SCHOOL SPECIFIC	TOTAL 2019-2
00 TIDTON A 0 A DEADY (A 05 A 0 A	5 700 400	3 376 034	2 081 520	5 457 500		752.256	40.044	188 391	440.500	000 005	400 747	700.000		050.040	200 200	-26 647	47.050	00.040	-19.610	4 074 505	400.057	400.057					40.444		4.40=				470.000	
Q3 TIPTON ACADEMY (ACE ACAI	5,799,186	0,010,001	2,001,020	5,457,563	-341,623		42,944	100,001	148,502	203,685	138,747	722,269	-29,988	650,640	623,993	-26,647	47,853	28,243	-19,610	1,374,505	129,057	129,057	0	0	0	0	40,114	41,241	1,127	0	0	0	170,298	7,002,36
BRISTNALL HALL ACADEMY	4,019,792	2,434,185	1,608,454	4,042,639	22,847	431,275	61,464	160,918	99,930	93,712	16,001	432,025	751	565,544	544,261	-21,283	44,267	44,313	47	1,020,599	129,057	125,057	0	0	0	0	12,836	11,989	-847	0	0	0	171,070	7,002,36 5,204,283 7,422,83 7,422,83 7,424,83 5,678,22 8,919,43 4,947,76 3,986,34 5,391,93 4,948,93 5,852,36 6,776,63 3,959,72 663,79
GEORGE SALTER ACADEMY	4,429,096	2,610,513	1,715,971	4,326,484	-102,612	582,728	76,911	96,811	55,105	332,815	8,889	570,530	-12,198	401,127	401,109	-18	20,859	8,589	-12,270	980,229	129,057	129,057	0	0	0	0	35,992	37,062	1,070	0	0	0	166,119	5,472,83
HOLLY LODGE HIGH	5,816,420	3,496,453	2,283,661	5,780,114	-36,306	713,575	73,802	283,019	188,044	109,834	51,542	706,241	-7,335	674,975	648,907	-26,068	118,142	110,760	-7,382	1,465,907	129,057	129,057	0	0	0	0	45,138	47,753	2,615	0	0	0	176,810	7,422,83
OLDBURY ACADEMY (OCOS)	6,311,893	3,573,865	2,610,513	6,184,378	-127,515	629,613	50,528	195,840	170,644	181,955	40,044	639,010	9,396	645,120	648,101	2,982	86,066	59,101	-26,965	1,346,213	129,057	129,057	0	0	0	0	43,628	44,867	1,239	0	0	0	173,924	7,704,51
ORMISTON ACADEMY	4,205,056	2,687,925	1,655,762	4,343,687	138,631	359,008	8,954	127,234	15,475	192,830	7,132	351,625	-7,384	407,612	421,308	13,695	22,086	12,270	-9,816	785,202	129,057	129,057	0	0	0	0	28,144	29,795	1,651	0	0	0	158,852	5,287,74
ORMISTON FORGE ACADEMY (H	5,247,703	3,573,865	2,081,529	5,655,394	407,691	534,954	155,727	113,390	107,164	204,171	4,440	584,892	49,937	560,158	606,257	46,099	22,122	29,515	7,393	1,220,663	129,057	129,057	0	0	0	0	38,568	39,721	1,153	0	0	0	168,778	7,044,87
PERRYFIELDS HIGH	4,803,932	2,705,128	1,961,110	4,666,238	-137,694	318,309	37,045	93,380	132,120	48,420	13,320	324,285	5,976	394,394	387,094	-7,301	16,700	16,093	-607	727,472	129,057	129,057	0	0	0	0	151,415	155,457	4,042	0	0	0	284,514	5,678,27
PHOENIX COLLEGIATE HIGH	6,118,012	4,279,177	2,382,577	6,661,753	543,741	690,406	125,704	110,197	69,085	428,263	8,891	742,141	51,735	863,801	871,296	7,495	95,106	64,321	-30,785	1,677,758	129,057	129,057	0	0	0	0	163,043	450,867	287,824	0	0	0	579,924	8,919,47
Q3 ACADEMY (DARTMOUTH)	4,105,962	2,705,128	1,509,539	4,214,666	108,705	210,571	37,770	90,137	61,719	22,619	889	213,134	2,563	319,805	318,709	-1,095	1,228	11,157	9,929	543,000	129,057	129,057	0	0	0	0	56,051	61,043	4,992	0	0	0	190,100	4,947,70
Q3 Langley Academy	2,274,866	2,683,624	649,403	3,333,027	1,058,161	175,064	37,258	91,174	67,187	65,005	0	260,624	85,561	126,432	211,235	84,803	1,683	1,524	-159	473,383	129,057	129,057	0	0	0	0	72,791	50,877	-21,914	0	0	0	179,934	3,986,3
RSA ACADEMY (WILLINGSWTH)	4,075,802	2,851,351	1,449,329	4,300,680	224,878	544,336	33,682	70,175	109,585	213,475	164,609	591,527	47,191	284,067	317,312	33,244	7,370	4,913	-2,457	913,752	129,057	129,057	0	0	0	0	46,721	48,441	1,720	0	0	0	177,498	5,391,91
SANDWELL ACADEMY	4,127,504	2,619,114	1,539,643	4,158,758	31,254	328,782	49,445	86,800	108,010	88,054	7,111	339,419	10,637	237,165	261,658	24,494	3,681	2,454	-1,227	603,532	129,057	129,057	0	0	0	0	55,851	57,585	1,733	0	0	0	186,642	4,948,97
SHIRELAND COLLEGIATE ACADE	4,161,972	2,812,645	1,685,867	4,498,511	336,540	598,627	35,707	243,020	166,777	94,509	93,329	633,344	34,717	467,996	493,351	25,355	46,626	60,296	13,670	1,186,991	129,057	129,057	0	0	0	0	36,718	37,799	1,081	0	0	0	166,856	5,852,35
ST MICHAELS CE HIGH	5,174,459	3,083,588	1,978,313	5,061,900	-112,559	562,840	32,243	114,724	176,894	218,697	888	543,446	-19,394	561,555	535,222	-26,333	18,701	27,017	8,316	1,105,685	129,057	129,057	0	0	0	0	0	0	0	468,415	480,125	11,710	609,182	6,776,79
STUART BATHURST	3,102,091	1,948,208	1,225,694	3,173,902	71,811	332,005	56,483	78,358	66,330	126,406	11,591	339,167	7,163	319,532	320,278	746	12,270	11,043	-1,227	670,488	129,057	129,057	0	0	0	0	27,130	-13,718	-40,848	0	0	0	115,339	3,959,71
WEST BROMWICH COLLEGIATE	0	439,028	0	439,028	439,028	0	5,617	12,331	10,174	15,612	2,990	46,724	46,724	0	44,455	44,455	0	3,301	3,301	94,480	0	75,283	75,283	0	0	0	0	55,000	55,000	0	0	0	130,283	663,75
WODENSBOROUGH ORMISTON	3.812.986	2.700.827	1.389.120	4.089.947	276,960	480.472	60,280	59.614	115.725	269.866	8.026	513.511	33.038	506,484	555,465	48.980	28.807	47.121	18.315	1.116.097	129.057	129.057	0	0	0	0	25.143	25,780	637	0	0	0	154.837	5.360.8
WOOD GREEN ACADEMY	5,424,350	3,311,524	2,197,647	5,509,171	84.821	540,157	134,803	159,413	130.652	117,015	7,104	548,987	8.830	500,564	465,355	-35,208	11.052	22,103	11.051	1.036.446	129.057	129.057	0	0	0	0	27,548	27.096	-452	0	0	0	156,153	6.701.7
HEALTH FUTURES UTC	1,219,294	0	817,129	817,129	-402.165	145,566	7,586	24,139	22.874	38,130	9,820	102,549	-43.017	134,180	90,849	-43.331	23,396	14,724	-8.672	208,122	129.057	129.057	0	0	0	0	-22,570	0	22.570	0	0	0	129.057	6,701,77 1,154,30
	/ //																												,				7	
SECONDARY TOTAL	84,230,376	53,892,179	32,822,790	86,714,969	2,484,593	8,930,544	1,123,953	2,399,065	2,021,997	3,065,071	595,363	9,205,449	274,905	8,621,151	8,766,215	145,064	628,014	578,859	-49,156	18,550,523	2,452,083	2,527,366	75,283	0	0	0	884,262 1	,208,655	324,393	468,415	480,125	11,710	4,216,147	109,481,63
SCHOOLS TOTAL	185.910.999	156 075 702	32.822.790	190 709 592	2 997 592	18 393 917	1 519 141	5 137 356	4 349 600	6.579.693	1.242.812	18.828.603	434.686	25.205.621	25 733 995	520 274	4.469.112	4 104 250	-274 853	49 756 957	14.583.441	14 724 000	150.567	120.057	120.057	0 .	3.078.185 3	054 720	-23 465	1.199.423	1.240.374	40.051	19,158,158	257.713.59

TABLE D

ILLUSTRATIVE PUPIL PREMIUM ALLOCATIONS 2019/20

(Based on Jan 2018 Census)

		Total Pupil Premium
School Name	School Type	allocation
Abbey Infant School	Community school	£56,080
Abbey Junior School Annie Lennard Primary School	Community school Community school	£119,100 £97,640
Bearwood Primary School	Community school	£97,640 £190,720
Blackheath Primary School	Community school	£241,820
Bleakhouse Junior School	Community school	£92.660
Brandhall Primary School	Community school	£224,400
Burnt Tree Primary School	Community school	£166,320
Cape Primary School	Community school	£312,840
Causeway Green Primary School	Community school	£243,820
Crocketts Community Primary School	Community school	£174,240
Eaton Valley Primary School Ferndale Primary School	Community school Community school	£151,800 £148,780
Galton Valley Primary School	Community school	£192,720
Glebefields Primary School	Community school	£278,520
Grace Mary Primary School	Community school	£126,380
Great Bridge Primary School	Community school	£186,040
Grove Vale Primary School	Community school	£79,200
Hall Green Primary School	Community school	£270,140
Hamstead Infant School	Community school	£63,360
Hamstead Junior School	Community school	£118,800
Hanbury Primary School Hargate Primary School	Community school Community school	£176,540 £180,840
Hateley Heath Primary School	Community school	£227,340
Highfields Primary School	Community school	£116,800
Joseph Turner Primary School	Community school	£231,000
King George V Primary School	Community school	£107,220
Langley Primary School	Community school	£174,540
Lightwoods Primary School	Community school	£37,900
Lodge Primary School	Community school	£154,440
Lyng Primary School	Community school	£197,620
Moat Farm Infant School Newtown Primary School	Community school Community school	£121,440 £109,560
Oakham Primary School	Community school	£117,780
Ocker Hill Infant School	Community school	£57,400
Pennyhill Primary School	Community school	£305,900
Perryfields Primary School	Community school	£105,900
Reddal Hill Primary School	Community school	£167,640
Rood End Primary School	Community school	£223,080
Rounds Green Primary School	Community school	£203,280
Ryders Green Primary School	Community school	£198,980
Sacred Heart Primary School The Priory Primary School	Community school Community school	£116,460 £184,420
Tipton Green Junior School	Community school	£177,860
Tividale Community Primary School	Community school	£124,380
Tividale Hall Primary School	Community school	£139,240
Uplands Manor Primary School	Community school	£455,700
Warley Infant School	Community school	£75,240
Whitecrest Primary School	Community school	£27,380
Yew Tree Primary School	Community school	£286,320
Albert Pritchard Infant School	Foundation school	£75,240
Brickhouse Primary School Harvills Hawthorn Primary School	Foundation school	£123,740
Moat Farm Junior School	Foundation school Foundation school	£198,300 £207,200
Moorlands Primary School	Foundation school	£111,520
Old Hill Primary School	Foundation school	£127,360
Old Park Primary School	Foundation school	£144,860
Park Hill Primary School	Foundation school	£55,440
Rowley Hall Primary School	Foundation school	£278,100
Springfield Primary School	Foundation school	£184,800
Temple Meadow Primary School	Foundation school	£221,420
Wood Green Junior School	Foundation school	£128,300
All Saints CofE Primary School	Voluntary aided school	£112,200
Christ Church CofE Primary School Holy Name Catholic Primary School	Voluntary aided school Voluntary aided school	£183,480 £37,260
St John Bosco Catholic Primary School	Voluntary aided school	£37,260 £79,200
St Margaret's CofE Primary School	Voluntary aided school Voluntary aided school	£35,300

TABLE D

ILLUSTRATIVE PUPIL PREMIUM ALLOCATIONS 2019/20

(Based on Jan 2018 Census)

		Total Pupil Premium
School Name	School Type	allocation
St Mary's Catholic Primary School	Voluntary aided school	£77,880
St Matthew's CofE Primary School	Voluntary aided school	£111,180
Holy Trinity CofE Primary School	Voluntary controlled school	£190,380
St James CofE Primary School	Voluntary controlled school	£280,440
St Martin's CofE Primary School	Voluntary controlled school	£68,640
St Mary Magdalene CofE Voluntary Controlled Primary School	Voluntary controlled school	£64,340
Primary Schools Total		11,434,160
Holly Lodge High School College of Science	Foundation school	558,195
Perryfields High School Specialist Maths and Computing College	Community school	307,410
St Michael's CE High School	Voluntary aided school	439,580
Stuart Bathurst Catholic High School College of Performing Arts	Voluntary aided school	272,385
The Phoenix Collegiate	Foundation school	618,465
Secondary Schools Total		2,196,035
Maintained Mainstream Schools Total		13,630,195
Shenstone Lodge School	Community special school	52,660
The Meadows Sports College	Community special school	57,465
The Orchard School	Community special school	93,980
The Westminster School	Community special school	73,085
Special Schools Total		277,190
Sandwell Community School	Pupil referral unit	£85,515
The Primrose Centre	Pupil referral unit	£19,460
Whiteheath Education Centre	Pupil referral unit	£7,480
PRU Total		112,455
GRAND TOTAL		14,019,840

TABLE E - EARLY YEARS SCHOOL FUNDING 2019-20

 Basic Hourly Rate

 Maintained
 £3.90

 Private/Voluntary
 £3.90

 Childminders
 £3.90

 Deprivation

 10.00
 £0.00

 30.00
 £0.05

 70.00
 £0.10

 90.00
 £0.25

 100.00
 £0.25

No. 100 Processor Proces						1	1			100.00	£0.25	
									£0.25			
ABST PRINCIPADE 1,000 001 103 105 10		May-18	Oct-18	Provisional Census Data as	Average		Funding - Basic	Flexibility (Y/N)				Total - Funding
ALL CAMPATON AND 19	ABBEY INFANT	960	870	960	930	35,340	£137,826		0	21	£1,767.00	£139,593
A	ALBERT PRITCHARD INF	1,080	690	810	860	32,680	£127,452		0	11	£1,634.00	£129,086
RAMPOOLD AS DEF 100 100 700 720	ALL SAINTS JR & INF	615	555	600	590	22,420	£87,438		0	30	£1,121.00	£88,559
MARCHENIT MARCH	ANNIE LENNARD INF	360	255	315	310	11,780	£45,942		0	24	£589.00	£46,531
BROWNELL AS NOT	BEARWOOD JR & INF	930	510	720	720	27,360	£106,704		0	26	£1,368.00	£108,072
BRONDWICK 1.500 1.000	BLACKHEATH JR & INF	900	720	795	805	30,590	£119,301		0	31	£3,059.00	£122,360
CARTON CALES FROMANY	BRANDHALL JR & INF	1,290		1,060	1,082	41,129	£160,402		0	5	£0.00	£160,402
### PROPOSEDIR S NOT ## 1 1.00 20 20 20 20 20 20 20									0	89		£112,176
RAPT TERM, AS NO. 60. 400 17-700 RATE TO 10 CF4-10 100 CF4-10 CF4									0	41		£56,240
CARE PAR P		540	360	480			£68,172		0	13		
DADESTAN PERSONNELLAR BIN									0			
CHRIST-CARRIER AND 1 000 700 100 700 100 700 100 100 100 1									0			
CROCKETT APP FROMANY 1.158									0	66		
EXPONENTIALLY PROMATY 1.50 1.50 1.50 1.50 1.50 1.50 1.50 1.5									0			
EXPONEMENT RIP 1.500 946 1.105 1.1340 1.1350									0			
FERROLLES AS A PET 000 770 810 810 20.70 10.00 1									0			
CERPINGE DETT- R. A. IN C. IN P. IN									0	33		
CLESTREAD R. R. R.									0	E4		
GRACE MANY JEA RIPE 1,000 1,									0			
GRACE RESIDER A REF 1.000 720 900 9100 15.000 10.000 15.00									0			
MARBURY PRIMARY 1,000 720 900 900 34,000 £14,000 0 50 63,000 £14,000 1,000 770 53,000 £14,000 1,000 30,000 52,000 52,000 1,000 30,000 30,00									0			
HALL GEREN RA RIPE 400 401 402 403 404 405 405 406 407 406 407 407 406 407 407									0			
HAMSTEAN RIF									0			
HARDATE A INF 1,200									ŭ			
HARVILLE HANTHORN PR 750 750 750 750 750 750 750 750 750 750									0	ŏ		
HATELEY PERMARY FERNYMEN 570 750 750 740 28,120 £10,666 0 25 £1,400 £111,075 FERNYMEN FERNYMEN 775 746 660 660 25,840 £100,776 0 42 £2,940 FERNYMEN FERNYMEN 775 746 660 660 25,840 £10,0776 0 42 £2,940 FERNYMEN FERNYMEN 775 746 655 370 33,000 £24,974 0 97 £6,910 HOLYTHEAD IR BIF 1,000 776 655 370 33,000 £24,974 0 97 £6,910 HOLYTHEAD IR BIF 1,000 776 655 370 33,000 £12,974 0 0 77 £6,910 JOSEPH FURBER IR BIF 900 630 735 7755 28,000 £111,001 0 0 0 65,730 0 ETTINGER IR BIF 900 630 735 7755 28,000 £111,001 0 0 0 65,730 0 ETTINGER IR BIF 975 286 355 13,400 £23,941 0 776 £2,800 £117,002 RUNGIELEP PRIMARY 575 286 355 13,400 £23,941 0 776 £2,800 £15,000 SUNDIÉR PIRIX IR BIF 776 466 646 635 24,130 £23,011 0 776 £2,800 £55,000 SUNDIÉR PIRIX IR BIF 776 466 646 635 24,130 £23,011 0 776 £2,800 £15,000 SUNDIÉR PIRIX IR BIF 776 466 646 635 24,130 £23,011 0 776 £2,800 £15,000 SUNDIÉR PIRIX IR BIF 776 466 646 635 24,130 £23,011 0 776 £2,800 £15,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000 SUNDIÉR PIRIX IR BIF 1,000 675 885 870 33,000 £12,000									0			
HIGHFELDS AR NF									0			
FERNYHLIP, FRIMARY 7.35 645 660 690 25.540 £10.776 0 6.2540.0									0			
HOLY MARKE PCJ RS NIF 950 240 345 325 12.500 E48.65 HOLY TRINKT JR NIF 1.0500 775 585 870 33.00 £12.3264 0 677 6.661.200 E48.767 HOLY TRINKT JR NIF 900 830 773 775 775 775 775 775 775 775 775 775									0			
HOLY TRINY JR 8 NP									0	42		
HIGH-YEAD JR A INF									0	0		
JOSEPH TUNNER, R.S. INF 900 630 735 735 28.990 £111.801 0 88 £5.78.00 £117.622 L10.000									0			
JUBBLEE PARK JR & INF 375 375 376 377 378 378 378 378 378 378									0			
KING GERGELY PRIMARY 5.25 2.									0			
LANGLEY JR & INF 765		375		270					0		£2,128.00	
SUMMERHILL PRIMARY 785 795 990 810 30.780 £120.042 0 770 £3.078.00 £123,726	KING GEORGE V PRIMARY	525	255	285	355	13,490	£52,611		0	76	£2,698.00	
LODGE AR INF 630 485 675 600 22.800 £88.920 0 52 £2.2800 £91.200 £1.0000 £1.00000 £1.00000 £1.0000 £1.0000 £	LANGLEY JR & INF	765	495	645		24,130	£94,107		0			£96,520
LYNG_JUNIOR & INF	SUMMERHILL PRIMARY	735	795	900	810	30,780	£120,042		0	70	£3,078.00	£123,120
MESTY CROFT JR & INF	LODGE JR & INF	630	495	675	600	22,800	£88,920		0	52	£2,280.00	£91,200
MOAT FARM INF	LYNG JUNIOR & INF	1,050	675	885	870	33,060	£128,934		0	76	£6,612.00	£135,546
NEWTOWN JR & INF 360 330 380 380 380 13,680 £53,552 0 0 91 £3,420.00 £56,772 CARHAN JR & INF 810 750 885 815 30,970 £120,783 0 46 £3,057.00 1212,850 0 146 £3,057.00 £124,762 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 0 151 £3,553.00 £142,122 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £142,124 1 151 £3,553.00 £103,553.00 £1	MESTY CROFT JR & INF	855	540	750	715	27,170	£105,963		0	42	£2,717.00	£108,680
OAKHMMJR & INF 810 750 885 815 30,970 £120,785 0 645 645 645 645 645 645 645	MOAT FARM INF	720	585	750	685	26,030	£101,517		0	40	£2,603.00	£104,120
OAKHAMJ.R. & INF	NEWTOWN JR & INF	360	330	390	360	13,680	£53,352		0	91	£3,420.00	£56,772
OCKER HILLINFANTS 1,095 765 945 935 33,530 £138,567 0 0 551 £3,553.00 £142,126	OAKHAM JR & INF								0	46		£123,880
OLD PHILL JR & INF 645 465 525 545 20,710 £80,769 0 65 £2,071.00 £82,840 OLD PARK JR & INF 1,170 960 975 1,035 39,330 £153,387 0 9 38 £3,933.00 £157,320 £15	OCKER HILL INFANTS								0			£142,120
OLD PARK JR & INF 1,170 960 975 1,035 39,330 £153,387 0 0 38 £3,933.00 £105,222 0 0 20 £1,48,00 £106,571 VICTORIA PARK PRIMARY 780 780 780 780 780 780 780 78	OLD HILL JR & INF								0			£82,840
PARK HILL JR & INF 810 600 720 710 28,980 £105,222 VICTORIA PARK PRIMARY 780 735 795 770 29,260 £114,114 0 90 £5,852.00 £119,966 PRIORY PRIMARY 8450 540 600 530 20,140 £78,546 0 81 £4,028.00 £25,574 REDDAL HILL JR & INF 795 465 525 595 22,610 £88,179 ROOD END JR & INF 810 495 705 670 25,460 £99,294 ROUNDS GREEN JR & INF 915 690 855 820 31,160 £121,524 RVDERS GREEN JR & INF 915 690 855 820 31,160 £121,524 SHIRELAND HALL JR & INF 916 690 855 820 31,160 £121,524 SHIRELAND HALL JR & INF 917 885 525 600 570 21,660 £84,474 SHIRELAND HALL JR & INF 1,1110 825 990 965 36,670 £143,013 SPRINGFIELD PRIMARY 858 615 825 766 29,108 £113,521 ST FRANCIS XAV JR & INF 480 405 440 455 17,290 £67,431 ST GREGORYS JR & INF 255 405 540 645 610 23,180 £99,402 ST JAMES CE PRIMARY 705 600 615 640 24,320 £94,848 57 JAMES CE PRIMARY 705 600 375 405 460 17,480 £69,722 ST MARTINS JR & INF 600 375 405 460 17,480 £69,722 ST MARTINS JR & INF 600 375 405 460 17,480 £69,722 ST MARTINS JR & INF 600 375 405 460 17,480 £69,722 ST MARTINS JR & INF 600 375 405 460 17,480 £69,722 ST MARTINS JR & INF 600 375 405 460 17,480 £69,722 ST MARTINS JR & INF 600 375 405 460 17,480 £69,722 ST MARTINS JR & INF 600 375 405 465 555 405									0			
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ST MARY MAG JR & INF 345 240 285 290 11,020 £42,978 0 38 £1,102.00 £44,08 0	ST MARTINS JR & INF								0			£74,300
	ST MARY MAG JR & INF	345	240	285	290	11,020	£42,978		0	38	£1,102.00	£44,080

TABLE E - EARLY YEARS SCHOOL FUNDING 2019-20

Basic Hourly Rate	
Maintained	£3.90
Private/Voluntary	£3.90
Childminders	£3.90

Depri	vation
10.00	£0.0
30.00	£0.0
70.00	£0.1
90.00	£0.2
100.00	£0.2

								£0.25			
	May-18	Oct-18	Jan-2019 Provisional Census Data as at 18th Feb 2019	Average	Funded Hours per Year	Funding - Basic	Flexibility (Y/N)	Funding - Flexibility	Pupils in lowest SOA (IMD) %	Funding - Deprivation (IMD)	Total - Funding
ST MARY'S JR & INF	480	330	450	420	15,960	£62,244		0	36	£1,596.00	£63,840
ST MATHEWS JR & INF	735	555	630	640	24,320	£94,848		0	76	£4,864.00	£99,712
ST PAULS JR & INF	375	330	0	235	8,930	£34,827		0	45	£893.00	£35,720
ST PHILIPS JR & INF	465	330	465	420	15,960	£62,244		0	91	£3,990.00	£66,234
TAMESIDE PRIMARY ACADEMY	945	495	660	700	26,600	£103,740		0	61	£2,660.00	£106,400
TEMPLE MEADOW JR & INF	615	450	465	510	19,380	£75,582		0	40	£1,938.00	£77,520
TIMBERTREE JR & INF	405	420	525	450	17,100	£66,690		0	11	£855.00	£67,545
TIVIDALE HALL JR & INF	825	525	645	665	25,270	£98,553		0	20	£1,263.50	£99,817
TIVIDALE COMMUNITY	1,035	840	945	940	35,720	£139,308		0	9	£0.00	£139,308
UPLANDS PRIMARY	1,410	1,080	1,425	1,305	49,590	£193,401	Υ	£12,397.50	44	£4,959.00	£210,758
VICTORIA INFANTS	1,185	735	885	935	35,530	£138,567		0	45	£3,553.00	£142,120
WARLEY INFANTS	570	405	405	460	17,480	£68,172		0	26	£874.00	£69,046
WEDNESBURY OAK JR & INF	735	645	810	730	27,740	£108,186		0	30	£2,774.00	£110,960
YEW TREE JR & INF	915	750	945	870	33,060	£128,934		0	6	£0.00	£128,934
Total Maintained	59,853.0	44,787.5	53,215	52,618	1,999,497	£7,798,037		£12,397.50		£202,218.90	£8,012,653

TABLE F: DSG De-delegated Budgets 2019-20

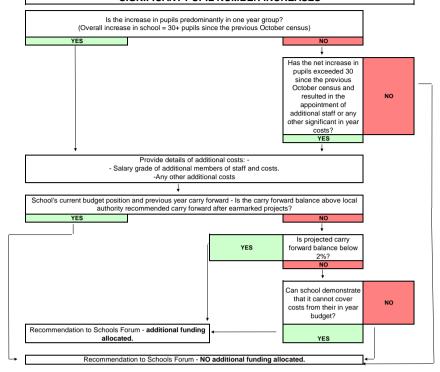
REF	NAME	LEAD OFFICER	2019-20	Primary	Amount per Pupil	Secondary	Amount per Pupil
	De-delegated Budgets (Maintained Schools)		Pupil No	26,600		5,893	
			FSM	5,587		1,229	
	Behaviour Support Services						
1	Special Advisory Teachers - SEMH (previously Behaviour Support Team)	Kuldip Berdesha	414,300	352,200	13.24	62,100	10.54
2	Preventing Primary Exclusions Team	Kuldip Berdesha	152,500	152,500	5.73	0	-
	Total Behaviour Support Services		566,800	504,700		62,100	
	<u>Licences/Subscriptions</u>						
3	Health and Safety Licenses and Subscriptions	Andrew Timmins	13,000	10,600	0.40	2,400	0.40
4	EVOLVE Annual Licence Fee	Bob Brooks	6,100	5,000	0.19	1,100	0.19
	Total Licences/Subscriptions		19,100	15,600		3,500	
	Staff Costs Supply Cover						
5	Union Facilities Time	Richard Oakes	202,000	202,000	7.59		
	School Improvement	Andrew Timmins					
6	School Improvement Services	7 undrew Timmine	100,000	81,900	3.08	18,100	3.07
	Contingencies						
7	Schools in financial difficulty	Chris Ward	250,000	204,700	7.70	45,300	7.69
	TOTAL DE-DELEGATED - MAINTAINED SCHOOLS		1,137,900	1,008,900		129,000	

Education Functions 2019-20

REF	NAME	LEAD OFFICER	2019-20	Amount per Pupil
	Education Functions (Maintained Schools)		Pupil No	32,493
		0 14 (1 5:1:	2/52 222	05.00
7	Education Benefits Team	Sue Moore/Joy Djukic	£172,000	£5.29
8	Children's Clothing Support Allowance	Sue Moore/Joy Djukic	£30,000	£0.92
9	Safeguarding and Attendance	Ramsey Richards	£244,000	£7.51
	TOTAL EDUCATION FUNCTIONS - MAINTAINED SCHOOLS		£446,000	13.73

REF	NAME	2019-20
	All Schools including academies	
	Statutory/Regulatory/ Education Welfare/Asset Management	£1,259,000
	Schools Forum	£3,000
	Admissions Services	£452,600
	Historical Commitment - Pensions Administration	£264,400
	TOTAL EDUCATION FUNCTIONS - MAINTAINED SCHOOLS	£1,979,000

TABLE G: PUPIL NUMBER GROWTH CONTINGENCY - PROCESS FOR SIGNIFICANT PUPIL NUMBER INCREASES



School Organisation Contingency Funding Requests Criteria

General Guidance

1.3

LA requested PAN/Bulge Class - Additional funding will automatically be allocated to schools that are increasing their

PANs or has a bulge class at the request of the local authority. The amount of funding allocated will be: The school would receive basic entitlement/AWPU funding until the pupils are counted in the next October census and forms part of the Schools DSG Schools Block funding. This could result in pupils being funded for one academic year, which would cross over two financial years. (Basic per Pupil Entitlement x Additional Pupils x Year 1 7/12ths; Year 2 5/12ths.)

- "Excepted pupils" over PAN If a school accepts additional pupils over PAN; the school would receive 50% Basic Entitlement/AWPU until the pupils are counted in the next October census and it forms part of the schools basic funding.
 - Mid-Year Admissions If a school has a minimum of 30 pupils net increase over the previous October census; the school will receive 50% Basic Entitlement/AWPU until the pupils are counted in the next October census and it forms part of the schools basic funding.
- 1.4 Application Forms The Authority would automatically calculate the funding for all schools meeting the criteria as detailed in 1.1 to 1.3 so there would no longer be a requirement for schools to complete application forms in these
 - It is anticipated that schools meeting the criteria set out in section 1.1 would be paid from September of the relevant financial year. Schools meeting the criteria in section 1.2 and 1.3 would be paid in February.
- Any other requests for additional funding must be made in writing to Schools Forum by the Headteacher on behalf of
 The deadline for receiving requests for additional funding where there is an increase in one year group is 30th
- November of each year. The deadline for receiving requests for additional funding for mid -year admissions is 28th February of each financial year.
- 1.7 The Head's attendance is required at the appropriate Schools Forum meeting in order that clarity can be achieved and any questions answered. (All member interests must be declared).
- 1.8 Head's must then leave the room for Schools Forum members to discuss the requests. The decision will be notified to them by the next working day.
- 1.9 Forum members must consider the requests for additional funding and advise on any funding adjustments using the following criteria as a guide.
- 1.10 Only one allocation per school will be made from this budget each financial year.
- 1.11 Information on additional pupils will be taken from the official October and January census only. If this information has not been submitted by the school then no additional funding will be awarded.
 Applications requests based on the October census will be taken to School Forum in January and if approved paid in February. Applications requests based on the January census will be taken to Schools Forum in March and if approved
- commence payments in April.

 1.12 No additional funding will be available for general "overall" school increases in pupil numbers. An analysis of year group increases will be required and will have to demonstrate the requirement for additional classes/members of staff.
- 1.13 The template below must be completed and submitted in order to request pupil growth funding.

Ī	PUPI	L GROWTH FUND	ING TEMPLATE		
Ī	SCHOOL				•
#	Please detail the change in pupil	numbers (since the Octob	er census on which your	funding was based) acros	s veat atoms; -
	DATE OF PUPIL COUNT	Thumbers (since the Octob	l	runding was based) acros	s year groups
[DATE OF T OF IL COORT	CHANGE IN PUPIL			
	YEAR GROUP RECEPTION/YEAR 7 YEAR 1/YEAR 8	NUMBERS			
	YEAR 2/YEAR 9 YEAR 3/YEAR 10 YEAR 4/YEAR 11				
	YEAR 5 YEAR 6				
•	TOTAL CHANGE				
	Please detail additional costs that Please provide grade and salary		result of the increase in p	pupil numbers e.g. new sta	aff or reallocation of sta
#	Please provide details of the last	Last Outurn (£000)	3 year projections for th Current Year (£000)	e school. Year 2 (£000)	Year 3 (£000)
-	LA Eunding/CAC				
Ī	LA Funding/GAG				
ſ	Other Income	0	0	0	0
I	TOTAL FUNDING				
ŀ	Staffing Costs				
ŀ	Premises Costs				
ŀ	Transport Costs				
ļ	Admin Supplies				
ŀ	ICT				
ļ	Learning Resources				
ļ	TOTAL EXPENDITURE	0	0	0	0
	B/fwd Balance			0	0
	CUMULATIVE BALANCE	0	0	0	0
	Balance as % of Funding				
4 1	Balances carried forward for the	last 3 years			ı
ŀ	Balance Carried forward				
<i>‡</i>	Balance as % of Funding For the current financial year ple	ase provide details of items	s earmarked from your p	rojected balance and the r	emaining balance
	following this.				-
	following this. Projected Balance – Current Yo	ear			
	following this.	ear			
	following this. Projected Balance – Current Yo	ear			
	following this. Projected Balance – Current Yo	ear			
	following this. Projected Balance – Current Yo	ear			
	following this. Projected Balance – Current Yo	ear			
	Projected Balance – Current Your Earmarked amounts: - Remaining Balance % Following this, if your projected by the second seco	valance is above the local a	uthority recommended li		% for Secondary) no
	Projected Balance – Current Yi Earmarked amounts: - Remaining Balance %	valance is above the local a	uthority recommended li		% for Secondary) no
	Projected Balance – Current Y. Earmarked amounts: - Remaining Balance % Following this, if your projected be funding will be allocated. If you	valance is above the local a	uthority recommended li re 2% please explain wh	y these additional costs ca	% for Secondary) no annot be covered by yo

TABLE H - ADDITIONAL NEEDS FUNDING CRITERIA

- Funding will only be allocated to schools that have admitted a minimum of 5 pupils with additional needs.
- Funding will only be allocated to schools that it has been agreed meet the criteria for the existing pupil growth
- Schools will need to highlight the need for 'additional needs' funding as part of their request for funding for general
- Information from the latest census will be used to verify whether any of the additional pupils have additional needs.
- If a pupil is logged as having English as an Additional Language the following per pupil allocations will apply (in line

Primary	Secondary
£846	£1,227

• The pupils postcode will be matched to the relevant IDACI band and the following allocations applied if applicable (in line with the current funding formula): -

IDACI Band	Primary	Secondary
IDACI Band D	£460	£667
IDACI Band C	£506	£734
IDACI Band B	£557	£807
IDACI Band A	£612	£888

- No further funding allocations will be made once the £1m budget available has been used.
- If you are a school that has been expanded at the request of the local authority and have therefore been automatically allocated pupil growth funding please contact the Schools Strategic Finance Unit to request to be considered for additional needs funding.

Agenda Item 6

Schools Forum

11th March 2019

Schools in Financial Difficulties

This report is for decision

1. Recommendations:

That Schools Forum members:

1.1 Accept the contents of the report and approve the process as outlined in the report in order for schools in financial difficulties to be considered for funding.

2. Purpose

2.1 To present and obtain approval from school forum members on the proposed criteria for issuing funds to schools in financial difficulties

3. Report Details

- 3.1 During the course of the last few years the impact of national education funding changes and employment legislation has seen an increased number of schools experiencing financial difficulties. In the main schools have managed their resources very well during government austerity measures and maintained good quality provision for children and young people. However, the number of schools with annual surplus balances is reducing rapidly and an increasing number of school are operating budgets with an in year deficit.
- 3.2 Following the annual funding consultation with schools it was agreed at Schools Forum that a sum of £250k should be held within DSG to support schools which have reached a financial crisis point which cannot be managed through normal budget and staffing measures.

3.3 When agreeing to this de-delegation of funding schools have indicated the following points.

3.4 The funding is NOT

- for academies, PRUs and special schools
- a mitigation for weak budget and staffing management by a school
- an ongoing amount to be claimed to offset annual budget shortfalls

3.5 The funding IS

- for contributing schools only (LA maintained)
- to support schools where unforseen additional costs have occurred which cannot reasonably be built in to a deficit recover plan
- to support schools where a one year dip in DSG/income is expected
- to support costs where a school in a deficit position is forced in to academy status

3.6 Eligibility Criteria

- Schools can request financial support if, at the end of financial closedown, they are in a deficit position without carry forward. These schools will be in discussions with the school finance team about their deficit recovery plan or already have one in place
- Schools in special measures, with a deficit recovery plan, which are forced to convert to academy status before the deficit recovery plan has delivered all financial savings.

3.7 Limits of support

• The total annual funding available is £250,000. There is no further funding available in year.

- Schools can only apply for support once in a financial year except where forced academy conversion may leave a deficit budget
- The maximum support for a single school is £125,000 per year
- Unallocated funding will be carried forward to the next financial year.

3.8 **Applications**

- Written submissions can be made by Chair of Governing Body to Schools Forum.
- Submissions must be accompanied by the school deficit recovery plan and current budget information
- Schools are expected to include details of all savings, including proposed staffing changes, in deficit recovery plans.

SCHOOLS FORUM: Funding Support Application Form 2018/19

School Name	
Chair of Governors	
Chair of GB Finance	
Chair of GB Staffing	
Overview of reasons why the school is applying for support	
Budget final out turn figure 2018/19	
In year deficit 2018/19	
List action already undertaken in 2018/19 to reduce in year deficit	
List further action and savings required to return to a balanced budget position within three years	
Funding Support Requested (Amount £)	
How will the support funding be used and what will be the impact of the funding?	

3.9 Information required to be attached to this request form

- The school budget summary of expenditure 2018/19
- The school budget summary expenditure plan for 2019/20
- Staffing structure chart showing all posts and any affected by the proposed restructuring plans
- The full deficit recovery plan, signed by Chair of Governing Body and agreed by Finance officers.

3.10 Process

- School to financially manage in year deficit to best of their ability leading up to financial close down including using all financial reserves available from previous years
- School to contact Council Finance Department and work together to agree a deficit recovery plan
- School to contact HR and agree restructuring plans (if this is required)
- Once end of year closedown figures have been finalised and the deficit recovery plan is agreed the school can apply to Schools Forum for Financial assistance.
- A sub-committee of Schools Forum will review the submission and make a recommendation to Schools Forum.
- Schools Forum votes on the recommendation from the subcommittee at the next available meeting.
- Schools which are successful in their bid to School Forum will receive funding as agreed to support their recovery plan.

3.11 Schools Forum: Sub-committee representatives

- 2 primary school headteachers
- 2 secondary school headteachers
- LA Finance officer
- LA School Improvement Officer

The sub-committee may require attendance from the school finance officer to present the case for support funding.

FOR SCHOOL FORUM USE				
School Forum Assurances Questions				
Has all information been submitted as required? Yes No				
Comment:				
Has the school taken sufficient steps in year to manage their in year deficit? Yes No				
Comment:				
Are plans to reduce expenditure in the future robust and will they deliver the required savings to achieve a balanced budget within 3 financial years? Yes No				
Comment:				
Is the proposed use of the support funding a reasonable and prudent use of resource? Yes No				
Comment:				

Sub-committee recommendation

N.B. A Yes recommendation can only be given where the bid has met all four criteria.

Recommend bid	YES / NO	Amount
Comment:		
Chair of sub-committee		
Date		

4. Recommendations

4.1 That Schools Forum

Accept the contents of the report and approve the process as outlined in the report in order for schools in financial difficulties to be considered for funding.

Chris Ward – Director of Education, Employment & Skills

Date: 05/03/2019

Contact Officer: Chris Ward Tel No: 0121 569 8335

Agenda Item 7

Schools Forum

11 March 2019

SPECIAL EDUCATIONAL NEEDS HIGH NEEDS BLOCK 2018/19 JANUARY 2019 MONITORING REPORT

This report is for decision

1. Recommendations:

That Schools Forum members:

1.1 Note the contents of the report in relation to the 2018/19 HNB Grant budget monitoring for the period 1 April – 31 January 2019.

2. Purpose

2.1 To provide schools forum with the HNB monitoring position as at 31 January 2019 projected to 31 March 2019.

3. <u>Links to School Improvement Priorities</u>

3.1 The continued improvement in attainment and progress rates of all pupils is integral to Sandwell's improvement strategy. Within this it is recognised that the performance of vulnerable groups funded through the High Needs Block arrangements, plays a key role in delivering improved outcomes overall. It is important to recognise that HNB funding resources are finite and need to be allocated to ensure professional services and learning support resources are available for schools to meet the needs of pupils whilst at the same time allowing schools enough scope to shape their support for young people.

4. HNB Budget 2018/19 Analysis

4.1 The HNB Grant for 2018/19 is was £37.609m. The DfE have allocated Sandwell an additional £1,702,844 over two years so the HNB shows an increase in grant of £851,422 in 2018/19. This will be shown on a separate line to highlight the fact that it has only been allocated for 2018/19 and 2019/20.

- 4.2 Table 1 shows the current budget, outturn as at 31 March 2019 and the variances
- 4.3 The current anticipated in year deficit is £903K. This will be reduced to a £52K deficit after application of the additional grant of £851K shown in the table.
- 4.4 The balance bought forward as at 1 April 2018 was nil as the deficit from 2017/18 was dealt with as reported to Schools Forum in June.
- 4.5 The main variances are as follows:
 - Place Funding £279K an additional 16 places are required in special schools, 9 of which are in The Meadows School following the agreed expansion. Changes in the Focus Provision funding by the DfE has required additional places to be funded for pupils who are admitted after the October census date. This equates to £119K.
 - Alternative Provision £1,200K the anticipated overspend is for pupils missing education, International new arrivals and hard to place pupils. This was raised as an issue in the outturn report presented to Forum in June 18 and work is currently being undertaken to look at the sudden increase in the pupils accessing this provision. This will be covered in more detail in a separate report.
 - SEN Developments currently funds staff salaries nearing the end of their contracts agreed by JEG in 2014/15 equating to £48K of which 28K will be met from the early years balances, costs for independent appeals and reports of £20K, an adjustment to the HNB funding from the DfE of £77K and the transfer in of £265K agreed by the Behaviour and Attendance Management Group. It also includes one off spend relating to the primary PRU.

Table 1 - HNB 2018/19 Budget Allocations

Budget Heading	Budget	Anticipated Outturn 31/3/19	Variance from Budget
	£000	£000	£000
1) Out of Borough Placements	2,907	3,030	123
2) Pupil Top Up Funding	20,487	20,335	(152)
3) Place Funding	7,516	7,795	279
4) Hospital PRU	988	988	0
5) SEN Support Services	998	879	(119)
6) Support for Inclusion	2,709	2,565	(144)
7) Alternative Provision	160	1,360	1,200
7) SEN Developments	204	(64)	(268)
8) Other SEN Funding	1,584	1,569	(15)
9) Exclusions & Reintegration	56	55	(1)
TOTAL	37,609	38,512	903
Additional In year Grant	851	0	(851)
TOTAL	38,460	38,512	52

5. Other SEN Funding

- 5.1 Table 2 shows the breakdown of the other SEN funding of £1.584m
- 5.2 The reductions agreed by the Forum in September 2017 have been applied to the budgets.

Table 2 Other SEN Funding

Description	Budget 208/19 £000	Anticipated Outturn 31/3/19 £000
Central Recharges	508	508
SLAs with Health	87	87
Equal Pay Claim Special Schools	58	58
Transfer to CWD	96	96
Hospital Tuition	50	20
Mediation	10	25
Medical Malpractice Insurance	15	15
Non Statutory SEN Support	360	360
Contribution to SC Placements to be based on actual costs agreed on an individual basis	400	400
TOTAL	1,584	1,569

6. Focus Provision and Special School Place Funding

- 6.1 The attached shows the current position on the average occupancy for Focus Provisions and Special Schools from 1 April 2018 to 31 March 2019. No further amendments or updates will be made to this in this financial year as the delegation is now closed.
- 6.2 The Focus Provisions average under occupancy in 2018/19 was approximately 12%. It was 12 % at the beginning of the financial year, it increased to 15% in September as expected, pending the finalisation of key stage transfers, and ended on 8% in February 2018. There are still some EHCPs to be finalised naming focus provisions for which places are reserved.
- 6.3 The occupancy has also been affected by a new provision opening on 1September 2018, which has been taking pupils on a phased

transfer, a provision that is due to cease. Pupils will not be placed in the provision that has given notice to cease. As pupils leave the places commissioned will be reduced though natural wastage so that only those pupils on roll are funded.

- 6.4 Three of the four special schools were over occupancy throughout the financial year and in-year adjustments have been made to account for the increases.
- 6.5 Shenstone Lodge School, takes pupils on roll throughout the year and September transfers are managed on a phased intake basis. The school had an average of 6% vacancies during the summer term. This increased, as anticipated in the first few weeks of the autumn term to 16% and reduced from mid-October to March. The vacancies are now running at 1%.

7. Recommendations

That Schools Forum members:

7.1 Note the contents of the report in relation to the 2018/19 HNB Grant budget monitoring for the period 1 April – 31 January 2019.

Date: 4/03/2019

Contact Officer: Chris Ward Tel No: 0121-569-8338

Agenda Item 7 - Appendix 1

FOCUS PROVISION AVERAGE OCCUPANCY TABLE 2018/19

		%	%	%	%	%	%	%	%	%	%	%	%			Vacant Places @
			, .	, -		, .	, .	,,,	, .	, .	,,,	, -	, .	Discount of the last	None	
01:401 1 0 5 0:4	000	April	May	June	July	August	September	October	November		January	February	March	Places Available	Notes	March
Christ Church C.E. Primary	CCD	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	8		0
Crocketts Lane Primary	PD	83%	83%	83%	83%	83%	75%	83%	83%	83%	92%	92%	92%	12		1
Devonshire Infant Academy	CCD	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	5		0
Devonshire Junior Academy	CCD	100%	80%	80%	80%	80%	100%	100%	100%	100%	120%	120%	120%	5		-1
Ferndale Primary	CCD	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	10		0
Galton Valley Primary	MLD	90%	100%	100%	100%	100%	90%	90%	90%	100%	100%	100%	100%	10		0
Grace Mary Primary	CCD	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	8		0
Great Bridge Primary	CCD	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	8		0
Hargate Primary	HI	76%	76%	76%	76%	76%	71%	71%	71%	76%	76%	76%	76%	17		4
Hargate Primary	SEMH	No FP	0%	0%	0%	20%	20%	20%	20%	5	New Provision wef 1/9/18 Evolve I pupil	4				
															in the provision from November 2018	
Ocker Hill Academy	CCD	30%	40%	40%	40%	40%	50%	50%	70%	80%	80%	80%	80%	10		2
Springfield Primary	CCD	88%	88%	88%	88%	88%	75%	75%	75%	75%	75%	75%	75%	8	Provision is being ceased. No pupils will	2
															be admitted and places commissioned	
															wil be reduced to match occupancy. 4	
															Places from 01/04/2019	
St Martin's CE Primary	SEMH	20%	20%	20%	20%	20%	60%	60%	60%	60%	60%	60%	60%	5	1 place is reserved pending finalisation	2
															of EHCPs & start dates	
Uplands Manor Primary	SLCN	75%	75%	75%	75%	75%	50%	63%	63%	63%	63%	75%	75%	8	1 place is reserved pending finalisation	2
															of EHCPs & start dates	
Bristnall Hall High	CCD	96%	96%	96%	96%	96%	96%	96%	96%	96%	96%	100%	100%	25		0
St Michaels C.E High	PD	100%	100%	100%	100%	100%	95%	95%	95%	95%	95%	95%	95%	20		1
St Michaels C.E High	CCD	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	5		0
Wodensborough Ormiston Academy	HI	100%	100%	100%	100%	100%	80%	80%	80%	80%	80%	80%	80%	5		1
Wodensborough Ormiston Academy	CCD	92%	83%	83%	92%	92%	125%	125%	125%	125%	133%	133%	133%	12	Occupancy greater than commissioned	-4
															places. Additional places to be	
															commissioned. 25 Places from	
Tatal Communication		050/	050/	050/	050/	050/	050/	070/	000/	000/	040/	000/	000/	400	01/11/2019	44
Total Occupancy		85%	85%	85%	85%	85%	85%	87%	88%	90%	91%	92%	92%	186		14
Total Vacancies		12%	12%	12%	12%	12%	15%	13%	12%	10%	9%	8%	8%	1		

Academy Schools	
Occupied places is between	80% - 100%
Occupied places less than	80%
Occupied places over	100%

SPECIAL PROVISION AVERAGE OCCUPANCY TABLE

All figures are representative as at the first of the month

	% April	% Mav	% June	% July	% August	% September	% October	% November	% December	% January	% February	% March	Places Available	Notes	Vacanant Places @	% Vacant	Notes
Meadows	99%	99%	100%	99%	99%	111%	110%	110%	111%	110%	110%	110%	151	Notes	15 Places Over	0%	
Orchard Shenstone	101% 90%	101% 94%	101% 95%	101% 95%	101% 96%	101% 84%	101% 88%	101% 90%	101% 98%	101% 96%	101% 99%	101% 99%	145 80		1 Place Over	0% 4%	
Westminster	100%	101%	100%	101%	101%	104%	104%	104%	105%	105%	105%	105%	189		10 Places Over	0%	
Total Vegencies	99%	99%	99%	99%	100%	102%	102%	103%	104%	104%	104%	104%	565		3	1%	

Occupancy is between 90% & 100%
Occupancy is less than 90%
Occupancy is greater than 100%

Vacancies are less than 5% Vacancies are greater than 5%

SPECIAL PROVISION AVERAGE VACANCY TABLE

	% April	% Mav	% June	% July	% August	% September	% October	% November	% December	% January	% February	% March	Places Available	Notes	Vacanant Places @	% Vacant	Notes
Meadows		1%	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%	151	Notes	15 Places Over	0%	
Orchard	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	145		1 Place Over	0%	
Shenstone	10%	6%	5%	5%	4%	16%	13%	10%	3%	4%	1%	1%	80		3	4%	
Westminster	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	189		10 Places Over	0%	

Vacancies are less than 5%

Agenda Item 8

Schools Forum

11th March 2019

Annual Consultation on Arrangements for SEN Pupils, Early Years and Financial Issues

This report is for decision.

1. Recommendations:

That Schools Forum members:

- 1.1 Note the contents of the report in relation to the Dedicated Schools Grant as set out section 4.1 to 4.4 of the report.
- 1.2 Give a view to the Director of Education in respect of the financial issues for:
- 1.2.1 Arrangements for pupils with special educational needs;
- 1.2.2 Arrangement for use of pupil referral units and the education of children otherwise than at school:
- 1.2.3 Arrangements for early years provision;
- 1.2.4 Administration arrangements for the allocation of central government grants.

2. Purpose

2.1 To provide Schools Forum with information relating the the Dedicated School Grant (DSG) budget planning process and to carry out the annual consultation on financial issues, as required by the Schools Forums (England) Regulations 2012.

3. <u>Links to School Improvement Priorities</u>

3.1 The improvement in attainment and progress rates of all pupils is integral to Sandwell's improvement strategy. Within this it is recognised that the performance of vulnerable groups of pupils,

funded through high needs block arrangements, plays a key role in delivering improved outcomes overall. It is important to recognise the value of ensuring high quality early years provision and make effective use of all funding streams to support educational attainment. The Forum has a key role in ensuring financial resources are appropriately allocated to schools and services to deliver the best conditions for educational improvement.

4. Report Details

- 4.1 The DSG can only be used for the purposes of the Schools budget as defined in the School and Early Years Finance Regulations.
- 4.2 The DfE present the DSG in four funding blocks for the local authority:
 - Schools Block;
 - Early Years Block;
 - High Needs Block; and
 - Central School Services Block
- 4.3 Mainstream school's budgets have been issued for 2019/20. Special schools, PRU's were also issued with their budgets by 28th February 2018 as required by the regulations. Early Years providers
- 4.4 Table 1 details the funding given by the DfE for each block.

Table 1 – Sandwell DSG 2019/20 as at December 2018

Schools Block	Early Years Block	High Needs Block	Central School Services Block	Total DSG
£m	£m	£m	£m	£m
1			~ 111	

Annual Consultation Process

- 4.5 The Schools Forums regulations (England) Regulations 2012 state that the Local Authority must consult with the Schools Forum annually in respect of the following financial issues in order that Schools Forum can give a view:
 - Arrangements for pupils with special educational needs;
 - Arrangement for use of pupil referral units and the education of children otherwise than at school;
 - Arrangements for early years provision;
 - Administration arrangements for the allocation of central government grants.
- 4.6 A summary of each of the key areas is outlined below in order that Forum Members can give a view, as required under the 2012 Regulations.

Arrangements for pupils with special educational needs (SEN)

- 4.7 There have been significant changes to high needs funding to local authorities with the introduction of a national funding formula in 2018/19.
- 4.8 The immediate impact arising from a national funding formula for the High Needs Block was.
 - A baseline adjustment has been made to reflect a change in the funding of special units and resourced provision in mainstream schools from April 2018.
 - The adjustment is cost-neutral in terms of the DSG allocation to each local authority, but involves transferring £91 million from the high needs block to the schools' block.
 - an import export adjustment of £6,000 per pupil or student in the high needs national funding formula will be made.
 - This adjustment is to reflect any changes either in the placement by a local authority of pupils and students in

schools and colleges located in other local authority areas (exports), or in the funding required by schools and colleges accepting pupils and student's resident in other local authority areas (imports).

- As in previous years there will be further adjustments to the amounts of DSG that local authorities actually receive to take account of the funding for places in academies and colleges that is deducted from local authority allocations and paid directly by ESFA.
- The pre-16 place funding rates at SEN units and Focus provision units in mainstream schools will change. The 2019/2020 school's budget share is determined based on the total number of pupils on the roll of the school with sole and dual main enrolment status, including those in focus provision units, with no deduction made as in previous years. Places occupied by pupils on roll at the time of the school census return are funded at £6,000 per place. Where a place is not occupied by a pupil the place rate is £10,000.
- 4.9 Specialist educational establishments, such as special schools, Pupil Referral Units, have a planned place arrangement of £10,000 per pupil. The establishments then receive additional top-up funding (element 3) for each child with a statement of SEN or an Education Health and Care Plan is determined
- 4.10 The authority will continue to use a real-time approach to the distribution of top-up funding (i.e. the money follows the child). The level of top-up funding (element 3) for each child with an Education Health and Care Plan is determined using Sandwell's banding framework.
- 4.11 Due to the real-time funding approach, this could mean that the High Needs Block budget is placed under financial pressure during the financial year. The High Needs Block budget is also used to fund top-up across phases including Early years, Schools and FE establishments.
- 4.12 The Children and Families Act 2014 contains provisions which are a major reform of the present statutory framework for identifying children and young people with special education needs, assessing their needs and making provision for them.

- Statements have been replaced with a new 0-25 Education, Health and Care plans (EHC plans) for children and young people.
- The provision extends the rights and protections to 16 to 25 year olds in further education and training.
- Gives parents and young people greater control over the way their support is provided.
- 4.13 There are no changes proposed to Sandwell's mechanism for funding SEN central services for:
 - SEN service including High Cost Equipment
 - Looked After Children in Education virtual school
 - Inclusion Support including Sensory Support, Complex Communications and Autism Team and Early Years SEN.

The use of maintained Special Schools Places:

Special School	Number of Commissioned Places
Orchard	147
Meadow	167
Westminster	201
Shenstone	80
Total	595

The use of Focus Provision Places

School Phase	Number of Commissioned Places	Number of Commissioned Places	Number of Commissioned Places
		1/4/19	1/9/19
Primary	114	117	114
Secondary	67	75	75
Total	181	192	189

Arrangements for use of Pupil Referral Units and the Education of Children Otherwise than at school.

PRU provision is at:

- 4.14 The Primary PRU is based at the Primrose Centre, in Rowley Regis and has provision for 25 places for primary aged pupils
- 4.15 The Secondary PRU, Sandwell Community School, is located across 4 sites in the towns; Oldbury, Wednesbury, West Bromwich and Smethwick and offers 180 places for secondary aged pupils.
- 4.16 The Whiteheath Education Centre offers home tuition, hospital education and education within the centre based in Rowley Regis for children who have been referred for medical reasons. The unit is a 40 place provision. This provision is due to relocate to the Tipton site vacated by the Secondary PRU

Alternative Provision

- 4.17 The Local Authority has set up a centre; Sandwell Transition Education Partnership Service (STEPS)
- 4.18 The STEPS Centre supports children and their families/carers who are new to Sandwell and the UK, and speak English as an additional language.
- 4.19 The STEPS Centre provides:
 - EAL development for children new to Sandwell and the UK and for whom English is an additional language

- Information and short courses for their parents and carers
- EAL CPD opportunities for Sandwell schools
- Support for the transition of newly arrived children into Sandwell schools

Arrangements for Early Years Provision

- 4.20 The mental health and wellbeing of early year's children is becoming a growing concern both nationally and locally and therefore educational advice and strategies for early intervention are being reviewed and developed in order to further support the early year's sector.
- 4.21 The Early Years sector is a growing market due to the additional funding for two year olds and the extension of funding for three and four year olds from 15 free hours nursery education to 30 free hours for working parents from September 2017. The Local Authority has a duty to ensure that there are sufficient places available to ensure the successful take up of the offer.
- 4.22 To meet the demand for places new Early Years settings are being established at a rapid rate. There are now 108 registered Day Care settings in Sandwell. A new setting will require support to ensure its future sustainability as a business and the development of quality practice to ensure the highest possible outcomes for children. This support is required for at least 30 months as the setting works towards their first Ofsted Inspection.
- 4.23 The ongoing development and training of the Early Years workforce is integral to the development of good quality Early Years provision and raising the number of children who reach a good level of development at the end of the Early Years.
- 4.24 The Local Authority has a duty to support Early Years settings when they receive an Inadequate or Requires Improvement judgement from Ofsted to ensure they develop their quality of early education to improve outcomes for children.

Administration Arrangements for the allocation of Central Government Grants

4.25 Pupil Premium Grant

The grant provides funding for two Government policies:

- raising the attainment of disadvantaged pupils and closing the gap with their peers
- supporting children and young people with parents in the regular armed forces

For 2019/20 Schools will receive the following per pupil funding currently eligible for free school meals (FSM) or has been eligible for FSM in the past 6 years.

- Primary £1,320
- Secondary £935
- Service Child £300

The per pupil funding for looked after children is £2,300, which is administered by the Virtual Head for Looked after Children and they determine the allocations to be sent to schools.

The estimated grant for Sandwell maintained schools for 2019/20 is £14.020m.

4.26 Early Years Pupil Premium Grant

The DfE have set out how they intend to pay the grant to local authorities. From January 2018, they will use the school census and early years census to collect information on:

- how many eligible children in your area are taking up their entitlement to EYPP
- the eligibility criteria these children meet

The DfE will use this data to calculate how much funding they give each local authority in future financial years.

The authority has to fund all eligible early years' providers in Sandwell at the national rate of 53p per hour per eligible pupil.

This means that in the financial year 2019/2020, providers will receive £302.10 for each eligible child who takes up the full 570 hours of state-funded early education they are entitled to.

4.27 PE and Sports grant

The premium should be used to fund improvements to the provision of PE and sport, for the benefit of primary-aged pupils, to give them the opportunity to develop a healthy lifestyle.

Allocations for the academic year 2018/19 was calculated using the number of pupils in years 1 to 6, as recorded on January 2018 census, as follows:

- Schools with 17 or more pupils receive £16,000 plus £10 per pupil; and
- Schools with 16 or fewer pupils receive £1,000 per pupil.

The premium for the 2018/2019 academic year is funded over two instalments from the Secretary of State to the Authority as follows:

Financial Year	2018/19 Academic Year:
2018-19	September 2018 to
	March 2019
2019-20	April to August 2019

The DfE have not yet issued any information on the grant for the academic year 2019/20.

4.28 Post 16 Maintained Schools

The Education Funding Agency notifies the authority of the grant. The grant for 2018/19 was £3.118m. The full grant for 2019/20 is yet to be announced.

4.29 <u>Universal Free Schools Meals Grant for Infants</u>

Funding is based on a rate of £2.30 for each meal taken by eligible pupils in reception; year 1 and year 2. It is assumed that pupils will take 190 school meals in the course of a full academic year. This provides a figure of £437 per eligible pupil.

For the academic year 2018 to 2019 a provisional allocation to schools on the final allocation for academic 2017 to 2018. The balance based on actual census figures for October 2018 and January 2019 will be made in June 2019.

Allocation for academic year 2019 to 2020 has not yet been announced.

<u>Capital Grants – Devolved Formula Capital Grant</u>

The Devolved Formula Capital (DFC) allocation is direct funding for individual schools. Sandwell is responsible for the payment of DFC for all maintained schools excluding Voluntary Aided (VA) Schools who receive their funding direct from the DfE; as VA school's premises are not within the ownership of a local authority.

For 2019/20 Sandwell will allocate estimated DFC grant to schools of £0.623m.

Each institution gets a fixed lump sum of £4,000 and a variable amount based on their pupil numbers multiplied by the appropriate rate per pupil.

Pupil numbers are based on the school census collected in January 2018 and the 2018/19 Individualised Learner Record.

Funding rates 2019/2020	Phase- related Differential	Non-boarding pupil rate	Boarding pupil rate
Nursery / Primary	1.0	£11.25	£33.75
Secondary	1.5	£16.88	£33.75
Post-16	2.0	£22.50	£33.75
Special / PRU	3.0	£33.75	£33.75

5. Recommendations

That Schools Forum members:

- 5.1 Note the contents of the report in relation to the Dedicated Schools Grant as set out section 4.1 to 4.4 of the report.
- 5.2 Give a view to the Director of Education in respect of the financial issues for:
 - Arrangements for pupils with special educational needs;
 - Arrangement for use of pupil referral units and the education of children otherwise than at school;
 - Arrangements for early years provision;

• Administration arrangements for the allocation of central government grants.

Rosemarie Kerr, Principal Accountant – Schools

Date: 05/03/2019

Contact Officer: Rosemarie Kerr Tel No: 0121 569 8318

Agenda Item 9

Schools Forum

11th March 2019

Teachers' Pensions Employer Contributions

This report is for information

1. Recommendations:

That Schools Forum members:

1.1 Note the contents of the report

2. Purpose

2.1 To inform school forum members of the authority response to the consultation on "Funding Increases to teachers' pensions employer contributions.

3. Report Details

- On the 15th January 2019, the Department for Education (DfE) issued a consultation on "Funding Increases to teachers' pensions employer contributions". The deadline for responses was 12th February 2019.
- 3.2 The consultation was on the DfE proposal to support certain education institutions with the increase to employer contributions to the Teachers' Pension Scheme (TPS) in 2019-20.
- 3.3 The consultation focused on the TPS, which provides a pension for teachers in the following sectors: State-funded schools, Further Education (FE), Higher Education (HE), and Independent Schools. The department invited responses from the following groups or individuals:
 - TPS Employers
 - Teachers both those in affected sectors and those outside.

- Other staff working in these sectors
- Sector bodies

Background and Context

3.4 The consultation is included in Appendix 1 and the authority response is set out in Appendix 2.

4. Recommendations

That Schools Forum

4.1 Note the contents of the report

Rosemarie Kerr, Principal Accountant – Schools

Date: 05/03/2019

Contact Officer: Rosemarie Kerr Tel No: 0121 569 8318



Funding increases to teachers' pensions employer contributions

Government consultation

Launch date: 15 January 2019

Respond by: 12 February 2019

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1. Introduction

This is a consultation on the Department for Education's proposal to support certain education institutions with the increase to employer contributions to the Teachers' Pension Scheme (TPS) in 2019-20.

Who this is for

This consultation focuses on the TPS, which provides a pension for teachers in the following sectors: State-funded schools, Further Education (FE), Higher Education (HE), and Independent Schools. The department therefore invites responses from the following groups or individuals:

- TPS Employers
- Teachers both those in affected sectors and those outside.
- Other staff working in these sectors
- Sector bodies

Issue date

The consultation was issued on 15 January 2019.

Enquiries

If your enquiry is related to the policy content of the consultation, you can contact the team on:

TPSEmployerContributions.consultation@education.gov.uk

If your enquiry is related to the DfE e-consultation website or the consultation process in general, you can contact the DfE Ministerial and Public Communications Division by email: Consultations.Coordinator@education.gov.uk or by telephone: 0370 000 2288 or via the DfE Contact us page.

Additional copies

Additional copies are available electronically and can be downloaded from <u>GOV.UK DfE</u> consultations.

The response

The results of the consultation and the Department's response will be <u>published on GOV.UK</u> in spring 2019.

2. Background and Context

- 2.1 The TPS, along with all other unfunded public sector pension schemes, is required to complete a valuation every four years. The valuation has two main purposes: to assess the scheme's assets and liabilities and therefore the cost of providing pensions in the long-term; and to recalculate the employer 'cost cap' to determine whether it remains within the settlement reached in 2015.
- 2.2 In valuing the scheme, the Department must make several assumptions based on past scheme experience and take account of economic and other factors, provided by HM Treasury.
- 2.3 A significant factor affecting employer costs, and therefore the contribution rate needed, is the Superannuation Contributions Adjusted for Past Experience (SCAPE) discount rate, this is the rate used to determine the cost today of providing pensions into the future. This reflects the important principle that the full costs of pensions are recognised at the point they are earned and are provided for accordingly. At Budget 2018, HM Treasury confirmed there would be a further change (reduction) to the rate, to CPI + 2.4%, from April 2019. The change follows the Office for Budget Responsibility's latest forecast on long-term Gross Domestic Product, which estimated a lower than anticipated rate of growth and thus, under the mechanism agreed for determining the SCAPE rate, the need to adjust the rate in order to ensure costs continue to be provided for appropriately.
- 2.4 The estimated employer contribution rate required for the period from 1 April 2019 to 31 March 2023 is 22.8%. This is based on adjusting the scheme design by changing the rate by which pensions accrue. The Department has agreed, with HM Treasury, that the employer contribution rate for the current valuation will be implemented from 1 September 2019 rather than 1 April 2019. Whilst this gives employers more time to plan for the contribution change, there is an offset in that it will create a small deficit in the first year. In order to recover this deficit an amendment to the contribution rate, to take account of the fact that it will not be paid for the full valuation period, will be made resulting in an employer contribution rate of 23.6% from 1 September 2019 to 31 March 2023.
- 2.5 These are draft valuations. If final employer contributions are higher or lower, the Department will adjust the funding allocated accordingly to ensure that institutions who we have proposed to fund are fully compensated.

Effect on the institutions

- 2.7 These changes will bring about increased costs for affected institutions. This Consultation Document concerns itself with four education 'sectors' Statefunded schools, Independent schools, FE, and HE. For more details on the institutions that fall in these categories, please see 4.6 and 4.12.
- 2.8 Overall the Department estimates the overall increased costs to be £1.1bn in 2019-20 across these four sectors, split as follows, rounded to the nearest £10m:

Education Sector	Cost in 2019-20 from 1 Sept 2019 Implementation (£m)
State-funded schools	830
Independent schools	110
FE	80
HE	80

2.9 These costs include the funds from delaying the implementation from 1 April to 1 September 2019, at a payback rate that would see the amount fully returned in March 2023 (although the exact speed of payback has not yet been determined).

3. About this consultation

- 3.1 The Department has chosen to run a public consultation to ensure that all affected sectors have an opportunity to share views on the impact these changes will bring.
- 3.2 This Consultation Document seeks views on the proposal to provide funding to support i) schools (see 4.6 for breakdown) and ii) FE colleges and other public-funded training organisations (see 4.12 for breakdown), to cover the increase in employer contributions, and to better understand the impact on the HE sector and Independent schools, for whom it is proposed that funding support will not be provided.
- 3.3 The Consultation Document therefore sets out:
 - The decisions leading up to the publication of the draft HM Treasury directions in September 2018.
 - The Department's proposed approach to support some institutions in meeting these increased employer contributions in FY 2019-20¹.
 - The recourse for all affected parties to give their views on the approach.
- 3.4 This Consultation Document seeks to understand:
 - Views on those sectors that DfE proposes to support. This will contribute to our evidence base for our current funding proposition.
 - The impact on sectors that DfE proposes not to support. This will enable us to gain a fuller understanding of the impact of these changes and inform any mitigations we may therefore wish to put in place.
- 3.5 This consultation is:
 - a) Concerned with the effect of the <u>increased costs resulting from</u> <u>changes to the TPS</u> on each sector, rather than wider funding to individual sectors.
 - b) Concerned with costs in 2019-20 as the final year of the current Spending Review. For most institutions that are funded on a financial year basis, this means through to March 2020. For academies and colleges that are funded on an academic year basis, this means

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¹ See para 3.5b for more information

- through to August 2020. The funding of this commitment and any other funding beyond 2019-20 is a question for Spending Review 2019.
- c) About institutions in <u>England only</u>. Funding for institutions in Devolved Administrations is a matter for those governments.
- d) Only concerned with funding the increased employer contribution costs of the Teachers' Pension Scheme. The Ministry of Housing, Communities and Local Government are running a separate consultation on Fair Deal and strengthening pension protection in respect of non-teaching staff under the Local Government Pension Scheme (LGPS)².
- This consultation is not about the allocation mechanisms for the funding reaching affected institutions. For this, the Department will work with the schools sector (excluding independent schools) and FE sector representatives, including: the School and Academy Funding Group (SAFG); the Service Working Group for Education and Children's Service (SWGECS); The Association of Colleges (AOC); the Sixth Form Colleges Association (SFCA); Collab; HOLEX; and Natspec, to discuss the most appropriate allocation methodology for funding. There will also be opportunities for discussion with representative bodies on a one-to-one basis. As it is not currently the Department's position to fund HE providers and Independent schools, no discussions on allocation mechanisms will take place at this time.
- This consultation will last four weeks from 15th January 2019 to 12 February 2019.

² https://www.gov.uk/government/consultations/local-government-pension-scheme-fair-deal-strengthening-pension-protection

4. Funding Rationale

- 4.1 The Department proposes funding i) schools (see 4.6 for breakdown) and ii) FE colleges and other public-funded training organisations (see 4.12 for breakdown) for these increased costs.
- 4.2 The Department believes it is fair, practical and reasonable that institutions are funded on a whole sector basis, to ensure that all institutions are given an equal opportunity to adjust to the costs and to ensure equity across the country and the system.
- 4.3 One of the Department's priorities is that every pound is optimally allocated. This has led to some difficult decisions, namely not proposing to fund i) Universities and other organisations providing Higher Education obliged to offer TPS and ii) Independent schools, for these increased costs. We value these sectors and are committed to seeing them thrive, but our evidence suggests that i) schools (see 4.6 for breakdown) and ii) FE colleges and other public-funded training organisations (see 4.12 for breakdown), are in high levels of need for additional support for these costs and are most directly funded by Government grant(s). This is therefore our starting position but we would like to use this consultation to test the impact on other providers.
- 4.4 The Department does not propose to provide funding to any other organisations not already listed who participate in the scheme on a voluntary basis but are conducting a consultation to understand the impact upon all sectors to inform the Department in making a final decision.

Providing funding to schools

- As a Government, we have committed to protecting state-funded schools. In 2017, the Department invested a further £1.3bn over and above plans set out at the last Spending Review and is committed to protecting school funding in real terms per pupil through to 2019-20. The Department recognises the significance of this pension pressure and intends to protect schools from it by fully funding the increase in employer contribution rate in 2019-20. Centrally employed teachers are not directly employed by schools. However, we recognise the work they do to support pupils in schools. Given this, and the significance of the pension pressure, we intend to provide funding for centrally employed teachers.
- 4.6 The department proposes providing funding towards the following institutions to cover the £830m increase to employer contributions in FY 2019-20:

- Mainstream and special maintained schools
- Mainstream and special academies (including Alternative Provision, 16-19 academies and free schools)³
- Maintained nursery schools
- Non-maintained special schools
- Independent Special Schools, to the extent they educate children with Education, Health and Care Plans.
- Local Authority Centrally Employed Teachers
- Music Education Hubs

Question 1.

Do you agree with the proposal to fund schools (as defined in 4.6) for these increased costs?

Providing funding to FE colleges and other public-funded training organisations

- 4.7 The FE sector, and colleges specifically, play a critical role in the continuing education and training of young people beyond the age of 16, supporting adults to retrain throughout their working lives, and reaching students from disadvantaged backgrounds who have not achieved good educational outcomes through compulsory education.
- 4.8 To meet the challenges set out in the Industrial Strategy⁴ the Department is establishing a technical education system intended to be on a par with the best in the world. Having high quality FE teachers will be critical to the successful delivery of our priorities in that strategy: Apprenticeships, post 16 Maths and English and in due course T levels.
- 4.9 We also anticipate more jobs will be subject to automation, requiring adults to re-skill to remain in the labour market and economically active. The FE sector will have a critical role delivering basic skills through to Level 6. Yet the UK

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³ See para 3.5b for more information

⁴ https://www.gov.uk/government/topical-events/the-uks-industrial-strategy

continues to rank poorly in the OECD skills comparison: The UK is in the bottom quartile for L4&5 technical skills, 3rd quartile for L2&3 intermediate skills and basic numeracy and the 2nd quartile for basic literacy and level 6 skills.

- 4.10 Alongside this ambitious reform agenda, the Department know colleges are in a financially challenging environment. Although by 2019-20 the funding available for apprenticeships in England will have risen to over £2.5bn and the Adult Education Budget protected in cash terms since the last Spending Review.
- 4.11 We want a financially sustainable sector, which is why we have already invested in restructuring of colleges. The government recognises that not funding the increased employer contributions would increase financial pressures that could undermine investment already made and influence, for example, colleges' ability to recruit and retain the teachers they need.
- 4.12 The following institutions are required to participate in the TPS, which the Department proposes providing £80m to cover the costs of increased employer contributions in FY 2019-20⁵:
 - General Further Education Colleges
 - Sixth Form Colleges
 - Designated Institutions (including the new designated institutions that form part of HE provider group structures).
 - Specialist Post-16 Institutions
 - Adult & Community Learning Providers

Question 2.

Do you agree with the proposal to fund FE colleges and other public-funded training organisations for these increased costs?

⁵ See para 3.5b for more information

Impact on Universities and other organisations providing Higher Education obliged to offer TPS

4.13 The Department also recognises there will be additional costs that will significantly affect Universities and other organisations providing Higher Education obliged to offer TPS. We therefore want to understand fully the impact across the HE sector for us to decide if mitigations are necessary. We invite responses from all affected institutions to understand the impact of these changes.

Impact on Independent Schools

4.14 The Department recognises that these costs will also place a pressure on the Independent schools sector and therefore invites responses to understand the effects these changes will impose.

Question 3.

Please provide any additional evidence relating to the impact on all sectors, which you think the Department should consider considering these proposals.

Equalities Impact

4.15 The Department's initial assessment is that the proposed approach does not impact on any protected characteristics aside from largely targeting funding to providers with those in education under the age of 18.

Question 4.

To what extent will this proposal have an impact on people with one or more protected characteristics?

5 How to Respond

To help us analyse the responses please use the online system wherever possible. Visit www.education.gov.uk/consultations to submit your response.

Other ways to respond

If for exceptional reasons, you are unable to use the online system, for example because you use specialist accessibility software that is not compatible with the system, you may download a word document version of the form and email it or post it.

By email

TPSEmployerContributions.CONSULTATIONS@education.gov.uk

By post

Kimble Silverman
Department for Education
Sanctuary Buildings,
Great Smith Street,
London
SW1P 3BT

Deadline

The consultation closes on 12 February 2019

The responses to the consultation will be analysed by us or an independent organisation under contract to Department for Education.

Information provided in response to consultations, including personal information, may be subject **to** publication or disclosure under the Freedom of Information Act 2000, or the Environmental Information Regulations 2004.

If a request for disclosure of the information you have provided is received, your explanation about why you consider it to be confidential will be considered, but no assurance can be given that confidentiality can be maintained. An automatic confidentiality disclaimer generated by your IT system will not, of itself, be regarded as binding on the department.

The department will process your personal data (name and address and any other identifying material) in accordance with the Data Protection Act 2018, and your personal information will only be used for the purposes of this consultation. Your information will not be shared with third parties unless the law allows it.

The department's <u>personal information charter</u> contains the standards you can expect from us when we ask for and hold your personal information.



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Response ID ANON-2NJM-XMB7-N

Submitted to Funding the education sector for teacher pensions increases Submitted on 2019-01-25 10:46:04

Introduction

1 What is your name?

Name:

Rosemarie Kerr

2 What is your email address?

Email:

rose_kerr@sandwell.gov.uk

3 What is your organisation?

Organisation:

Local Government

Questions on the Department for Education's current proposal

4 Which sector do you represent? (If more than one please select the sector which you work with/represent most closely)

Local Authority (Local Authority Centrally Employed Teachers, Music Education Hubs, Local Council)

text box:

I am representing a local authority with responsibility for maintained schools as well as centrally employed teachers

5 What is your role? (If more than one please select your primary role):

Local Authority Official

text box:

6 Do you agree with the proposal to fund schools (as defined in 4.6) for these increased costs?

text box:

- 1). The LA agree in principle with the proposal to fund schools as schools are already facing significant budget pressures, so without this funding this would make the situation much worse.
- 2). A suggestion was made as to whether an alternative to funding each school for the increase in pension rates, would be to keep the rate charged to schools at 16.48% and the government to directly fund the pension fund as this is a national fund, rather than distribute to all schools on a methodology which could be questioned by some or all stakeholders.
- 3). Local authorities and schools would need solid assurances that this additional funding, however distributed would continue after 2021 and into the next spending review.
- 4). Without this additional funding, schools when faced with the considerable increase in TPS costs, would have no alternative but to make redundancies/restructure to keep within their funding allocations.
- 5). Local authorities with maintained schools with a post 16 provision want to be assured that the funding methodology takes into consideration the teachers employed to provide this service.
- 6). The authority is concerned that any delay in the payment of this funding could cause significant cashflow problems for schools, so this needs to be avoided at all costs.
- 7). The Local authority has experienced significant population increase, which has resulted in the requirement to ask schools to increase their PAN and to build new schools. The Local Authority are concerned that the lagged nature of funding for pupils, and the requirement to have additional new teachers straight away, could mean they are not factored into the funding methodology, but the school would be incurring the additional cost. This could cause additional budget pressures on the schools which have not yet been considered.
- 8). The authority with maintained special schools require assurances that the full budget implications are considered in the proposed funding methodology of the increased pension costs.
- 9). All schools need to know asap the spending review proposals after 2021 so the financial implications can be assessed properly and they have sufficient time to take action where necessary.

text box: Yes. The LA agree in principle. The principle of funding needs to be fair, equitable and consistent for those institutions which will be affected by this change.
8 Please provide any additional evidence relating to the impact on all sectors, which you think the Department should consider considering these proposals.
text box: Please refer to responses in question 6
9 To what extent will this proposal have an impact on people with one or more protected characteristics?
text box: Th
10 Would you like us to keep your responses confidential?
No
Reason for confidentiality:

7 Do you agree with the proposal to fund FE colleges and other public-funded training organisations for these increased costs?

Agenda Item 10

Schools Forum

11th March 2019

Scheme for Financing of Schools: Updates

This report is for information

1. Recommendations:

That Schools Forum members:

1.1 Note the consultation with maintained schools relating to updates to the Scheme for the Financing of Schools as outlined in the report and Appendix 1.

2. Purpose

2.1 This report is to inform school forum members that the authority will consult with schools on the updates to be made to the Scheme for the Financing of Schools.

3. <u>Links to School Improvement Priorities</u>

3.1 School leaders and the relevant committee of governing bodies should take note of proposed changes and how they impact on management of school finances and budgets.

4. Report Details

4.1 Local authorities are required by the Department for Education (DfE) to publish schemes of financing setting out the financial relationship between them and the schools they maintain.

Directed Revision

4.2 The Secretary of State may by direction revise the whole or any part of the scheme. In order to make a directed revision, the Secretary of State has to consult the relevant local authorities and other interested parties.

4.3 Updates to the guidance

- 4.4 Updates have been made to reflect current policy positions and changes in legislation:
- 4.5 paragraph 1.4: added "It is also possible for the Secretary of State to make directed revisions to schemes after consultation. Such revisions become part of the scheme from the date of the direction"
- 4.6 paragraph 2.1.4: added "The scheme should encourage schools to register anything that is portable and attractive, such as a camera"
- 4.7 paragraph 2.4: changed title from "Efficiency and Value for Money" to "School Resource Management"
- 4.8 paragraph 2.4: changed wording, including a change from "achieve efficiencies" to "effective management of resources"
- 4.9 paragraph 2.10: removed "A scheme may invite schools to nominate suppliers for inclusion on lists of approved suppliers. The intention is to ensure that schools do not have to be subjected to unreasonable requirements as to authority counter-signature or use of an approved list, but also ensures that they should obtain at least three tenders or quotations for orders above a certain threshold"
- 4.10 paragraph 2.10: removed "Authorities may issue lists of approved suppliers; but schools must not be compelled either directly or indirectly to use them. Authorities may wish to point out the advantages of using lists of approved suppliers, eg assurance on health and safety issues"
- 4.11 paragraph 2.10: added "Schools may seek advice on a range of compliant deals via Buying for schools (https://www.gov.uk/guidance/buying-for-schools)"
- 4.12 paragraph 2.14: removed generic references to legislation "School Premises Regulations and DfE Construction Standards, and health and safety legislation", added references to specific legislation
- 4.13 paragraph 2.16: removed advice that all local authorities with a delegated budget must submit the schools financial value standard

- form before 31 March 2013 and annually thereafter; replaced with advice that the form should be submitted before the end of the financial year
- 4.14 paragraph 3.6: added "Schemes may also wish to permit the use of credit or charge cards. However, no interest charges should be incurred by the school, with balances fully cleared on a monthly basis"
- 4.15 paragraph 5.1: added "However, where land is held by a charitable trust, it will be for the school's trustees to determine the use of any income generated by the land"
- 4.16 paragraph 6.2.2: changed "Other expenditure incurred to secure resignations where the school
- 4.17 had not followed authority advice" to "Other expenditure incurred to secure resignations where there is good reason to charge this to the school (see Annex B)"
- 4.18 paragraph 8.1: changed to explain the scheme should contain a provision barring the authority from discriminating in its provision of services on the basis of categories of schools, except in cases where this would be allowable under the school and early years finance regulations or the dedicated schools grant (DSG) conditions of grant
- 4.19 paragraph 8.2: clarification provided on provisions to limit the term of agreement with a school to buy services or facilities from the authority
- 4.20 paragraph 8.4: revised quoted legislation and updated expectation of monthly not annual returns
- 4.21 paragraph 10.1: added "The evidence required to demonstrate the parity of cover should be reasonable, not place an undue burden upon the school, nor act as a barrier to the school exercising their choice of supplier"
- 4.22 paragraph 11.11: clarification on how to fund early retirement and redundancy costs; changed "If the authority proposes to depart from this, then the scheme should contain a provision setting out the circumstances in which exceptions will be made" to "If the authority proposes to make local arrangements in accordance with

the act, then the scheme should contain a provision setting out how this will work"

4.23 section 13: updated to reflect changes to the Children and Families Act 2014; a school is no longer required to consult before establishing community facilities, and there is no longer a need for a school to be mindful of a local authority's advice, under section 27 of the Education Act 2002. Appendix C "Application of Schemes for Financing Schools to the Community Facilities Power" will be updated as soon a practicable.

There are significant updates to this section which schools will need to take particular regard.

- 4.24 paragraph 13.15: changed "Criminal Records Bureau" to "Disclosure Barring service"
- 4.25 annex A: (Refer to Section 1 of the Fair Funding Scheme) removed advice that an authority must publish a statement showing outturn expenditure "at both central level and for each school, and balances held in respect of each school"
- 4.26 annex A: (Refer to Section 1 of the Fair Funding Scheme) removed advice that each school must receive a copy of each year's budget and outturn statements so far as they relate to that school or central expenditure
- 4.27 annex C: updated in line with section 13

5. Recommendations

5.1 That Schools Forum members approve the updates to the Scheme for the Financing of Schools outlined in the report and Appendix 1.

Rose Kerr, Principal Accountant

Date: 05/03/2019

Contact Officer: Rose Kerr

Tel No: 0121 569 8318



Agenda Item 10 - Appendix 1

Scheme for the Financing of Schools

IL0: Unclassified

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IL0: Unclassified

Section 1: Introduction

1. Introduction and background

1.1 The funding framework

The funding framework which replaces Local Management of Schools is set out in the legislative provisions in sections 45-53 of the School Standards and Framework Act 1998 (the Act).

Under this legislation, local authorities determine for themselves the size of their schools budget and non-schools education budget – although at a minimum an authority must appropriate its entire Dedicated Schools Grant to their schools budget.

The categories of expenditure which fall within the two budgets are prescribed under regulations made by the Secretary of State, but included within the two, taken together, is all expenditure, direct and indirect, on an authority's maintained schools except for capital and certain miscellaneous items.

The authority may <u>deductretain</u> funding from the schools budget for <u>certain</u> purposes specified in regulations made by the Secretary of State under s. 45A of the Act. <u>(the centrally retained expenditure)</u>.

The amounts to be retained centrally are decided by the authority concerned, subject to any limits or conditions, (including gaining the approval of their Schools Forum or the Secretary of State in certain instances), as prescribed by the Secretary of State.

The balance of the schools budget left after deduction of centrally retained funds is termed the Individual Schools Budget (ISB). Expenditure items in the non schools education budget must be retained centrally. (although earmarked allocations may be made to schools).

Local authorities must distribute the ISB amongst their maintained schools using a formula which accords with regulations made by the Secretary of State, and enables the calculation of a budget share for each maintained school.

This budget share is then delegated to the governing body of the school concerned unless the school is a new school which has

not yet received a delegated budget, or the right to a delegated budget has been suspended in accordance with <u>Section</u>. 51 of the Act.

The Act requires the financial controls within which delegation works to be set out in a scheme made by the authority in accordance with Section 48 of the Act and regulations made under that Section.

-All proposals to revise the scheme must be approved by the Schools Forum, though the Authority may apply to The Secretary of State for approval in the event of the Forum rejecting a proposal or approving it subject to modifications that are not acceptable to the Authority.

Subject to any provisions made by or under the scheme, governing bodies of schools may spend such amounts of their budget shares as they think fit for any purposes of their school* and for any additional purposes prescribed by the Secretary of State¹ in regulations under Section 50 of the Act (*Section 50 has been amended to provide that amounts spent by a governing body on providing community facilities or services under section 27 of the Education Act 2002 are treated as if they were amounts spent for the purposes of the school (s50 (3A) of the Act).

An authority may suspend a school's right to a delegated budget if the provisions of the <u>authority's school</u> financing scheme (or rules applied by the scheme) have been substantially or persistently breached, or if the budget share has not been managed satisfactorily. A school's right to a delegated budget share may also be suspended for other reasons (Schedule 17 of the Act).

The authority is obliged to publish each year a statement setting out details of its planned <u>s</u>Schools <u>b</u>Budget and other expenditure on children's services, showing the amounts to be centrally retained and funding delegated <u>to</u> schools. After each financial year the authority must publish a statement showing out-turn expenditure, at both central level and for each school, and the balances held in respect of each school.

¹In regulations made under S.50 of the School Standards and Framework Act 1998.

The detailed publication requirements for financial statements are set out in directions issued by the Secretary of State, but each school must receive a copy of each year's budget and out turn statements so far as they relate to that school or central expenditure.

A copy of each year's budget and outturn statement should be made easily accessible to all schools.

Regulations also require an authority to publish their scheme and any amendments to it on a website accessible to the general public, by the date that any revisions come into force, together with a statement that the revised scheme comes into force on that date.

1.2 The role of the scheme

This scheme sets out the financial relationship between the authority and the maintained schools that it funds. It contains requirements relating to financial management and associated issues, which are binding on both the authority and on the schools.

1.2.1 Application of the scheme to the authority and maintained schools

This scheme applies to all community, nursery, voluntary, foundation, community special and foundation special schools and pupil referral units (PRUs) maintained by Sandwell MBC (Please refer to the Schools Strategic Finance Unit to confirm if your school has to comply with these regulations).

1.3 Publication of the scheme

A copy of the scheme will be available on the main council website and the Schools Strategic Finance Virtual Office. This revised scheme came into force on 1 April 20196.

1.4 Revision of the scheme

Any proposed revisions to the schemes will be the subject of consultation with the governing body and the head teacher of

every school maintained by the authority before they are submitted to the Schools Forum for their approval.

All proposed revisions must be submitted to the Schools Forum for approval by members of the Forum representing maintained schools. Where the schools forum does not approve them, or approves them subject to modifications which are not acceptable to the authority, the authority may apply to the Secretary of State for approval.

It is also possible for the Secretary of State to make directed revisions to schemes after consultation. Such revisions become part of the scheme from the date of the direction

1.5 **Delegation of powers to the head teacher**

Each governing body is asked to consider the extent to which it wishes to delegate its financial powers to the head teacher, and to record its decision (and any revisions) in the minutes of the governing body.

The full governing body (or a committee of the governing body) must approve the school's first formal budget plan and agree the responsibilities of the head teacher and governing body in respect of the annual budget plan. Where a committee approves the full budget this must be ratified by the full governing body as soon as possible after. This includes any major decisions on virements between budget heads during the year. In practice decision-making often needs to be at short notice and the governors may wish to delegate the day-to-day management of a school's budget to the head teacher. The authority advises that the governors approve a virement limit for the head teacher of £20,000. All virements should be reported to the next available finance committee of the governors. The head teacher is responsible for ensuring that the correct financial practice and procedures are followed.

1.6 Maintenance of schools

The authority is responsible for maintaining the schools covered by the scheme, and this includes the duty of defraying all the expenses of maintaining them (except in the case of a voluntary school where some of the expenses are, by statute, payable by the governing body). Part of the way an authority maintains schools is through the funding system put in place under sections 45 to 53 of the Schools Standards and Framework Act 1998.

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Section 2: Financial requirements - audit

2.1 General Procedures

2.1.1 Application of financial controls to schools

In managing their delegated budgets, schools must abide by the authority's requirements on financial controls and monitoring.

Certain of these are directly referred to in this scheme while others are included in the following: -

- Financial Regulations and Procedures
- Contract and Procurement Procedure Rules
- School Bank Account Scheme (Appendix A to this scheme).

2.1.2 Provision of financial information and reports

Schools are required to provide the authority with details of expected and actual expenditure and income, in a form and at times determined by the authority. However, the authority may not require submission of such details more often than once every three months except for those connected with tax or banking reconciliation unless the authority has notified the school in writing that in its view the school's financial position requires more frequent submission or the school is in its first year of operation.

Schools are required to submit monitoring information on a termly basis in the Consistent Financial Reporting Format (Appendix D). See Appendix G for a description of the information required.

The Schools Strategic Finance Unit now has the ability to remotely access school's financial systems. Schools must allow the Finance Unit to access this information when it is considered necessary by the Chief Finance Officer.

2.1.3 Payment of salaries: payment of bills

The procedures for these will vary according to the choices schools make about the holding of bank accounts and the buying back of the authority's payroll system.

The procedures that apply to the different choices made by schools are set out in **Appendix A.**

2.1.4 Control of assets

Each school must maintain an inventory of its moveable non-capital assets in a form determined by the authority.

Schools should make use of the inventory module of their Financial Management Systems to record assets above £1,000 in value. The basic authorisation a procedure for disposal of assets is set out in the authority's Financial Regulations.

Schools are free to determine their own arrangements for keeping a register of assets worth less than £1,000. However, they must keep a register in some form.

Schools should register anything that is portable and attractive, such as a camera

2.1.5 Accounting policies (including year-end procedures)

Schools must abide by procedures issued by the authority in relation to accounting policies and year-end procedures.

These procedures are as set out in the following document in closedown guidance published each year.

2.1.6 Writing off of debts

Governing bodies are only authorised to write off debts following consultation with the Chief Finance Officer.

2.2 Basis of accounting

Reports and accounts furnished to the authority must be in accordance with the procedures laid down by the Chief Finance Officer.

2.3 Submission of budget plans

Each school is required to submit a budget plan to the authority by 15th May each year.

The budget plan must show the school's intentions for expenditure in the current financial year. This must show a detailed breakdown of planned expenditure and income for the year and the assumptions underpinning the plan. Schools may take full account of estimated deficits/surpluses at the previous 31st March in their budget plan.

The format of the budget plan shall be in a form as determined by the Chief Finance Officer and information will need to be reported on the Consistent Financial Reporting Format. (See **Appendix F** for further details on the information required to be submitted in support of budget plans).

The school's formal annual budget plan must be approved by the governing body or a committee of the governing body. Where it is approved by a committee, it must be ratified by the full governing body as soon as possible after.

The authority may also require the submission of revised plans where the authority deems it necessary. Such revised plans shall not be required at intervals of less than 3 months.

2.3.1 Submission of financial forecasts

The authority may require schools to submit a financial forecast covering each year of a multi-year period for which schools have been notified of budget shares beyond the current year.

2.4 <u>Efficiency and Value for MoneySchool Resource</u> <u>Management</u>

Schools must <u>demonstrate</u> <u>seek to achieve efficiencies</u> <u>effective</u> <u>management of resources</u> and value for money, to optimise the use of their resources and to invest in teaching and learning, taking into account the authority's purchasing, tendering and contracting requirements.

It is for head teachers and governors to determine at school level how to secure better value for money.

There are significant variations in efficiency between similar schools, and so it is important for schools to review their current expenditure, compare it to other schools and think about how to make improvements.

2.5 Virement

Schools are free to vire between budget heads in the expenditure of their budget shares but governors are advised to establish criteria for virement and financial limits, above which the approval of the governors is required. The authority recommends that this is set at £20,000.

2.6 Audit: general

Schools are required to co-operate both with auditors employed by the authority (internal audit) and auditors appointed by the Public Sector Audit Appointments Limited to audit the authority itself (external audit). This includes allowing access to the school's records for both internal and external auditors.

In regard to internal audit, all schools come within the audit regime determined by the authority. Details of this are set out in the authority's Financial Regulations).

In relation to external audit, all schools come within the authority's external audit regime as determined by the National Audit Office and Financial Reporting Council.

2.7 **Separate external audits**

In instances where a school wishes to seek an additional source of assurance at its own expense, a governing body is permitted to spend funds from its budget share to obtain external audit certification of its accounts, separate from any authority internal or external audit process. Where a school chooses to seek such an additional audit, it does not remove the requirement that the school must also co-operate with the authority's internal and external auditors.

2.8 Audit of voluntary and private funds

In addition to the normal internal and external audits, schools must provide audit certificates in respect of any voluntary and private funds they hold (e.g. school fund) and the accounts of any trading organisations controlled by the school.

2.9 Register of business interests

The governing body of each school is required to have a register which lists for each member of the governing body and the head teacher: -

- any business interests they or any member of their immediate family have;
- Details of any other educational establishments that they govern;
- Any relationships between school staff and members of the governing body,

This register must be kept up to date with notification of changes and through annual review of entries and available for inspection by governors, staff and parents and by the authority.

2.10 Purchasing, tendering and contracting requirements

Schools are required to abide by the authority's Financial Regulations and Contract and Procurement Procedure Rules in purchasing, tendering and contracting matters. Governing bodies/head teachers must assess in advance, where relevant, the health and safety competence of contractors taking into account the authority policies and procedures.

However, any section of these documents may be disapplied if they would require schools to:

- do anything incompatible with any of the provisions of the scheme, or any statutory provision, or any EU Procurement Directive;
- seek authority officer countersignature for any contracts for goods and services for a value below £60,000 in any one year;
- select suppliers only from an approved list,
- or would permit schools to seek fewer than three tenders or quotations in respect of any contract with a value exceeding £10,000 in any one year.

Schools may seek advice on a range of compliant deals via Buying for schools (https://www.gov.uk/guidance/buying-for-schools)"

2.11 Application of contracts to schools

Schools have the right to opt out of authority arranged contracts without exception.

Although governing bodies are empowered under paragraph 3 of schedule 1 to the Education Act 2002 to enter into contracts, in most cases they do so on behalf of the authority as maintainer of the school and the owner of the funds in the budget share. This is why the authority may require authority counter-signatures of contracts exceeding a certain value.

Any charges payable under commercial contracts so entered into by a governing body on behalf of the authority will be paid from

the governing body's school's budget share.

2.12 Central funds and earmarking

The authority is authorised to make sums available to schools from central funds, in the form of allocations that are additional to and separate from the schools' budget shares. Such allocations shall be subject to conditions setting out the purpose or purposes for which the funds may be used; and while these conditions need not preclude virement (except, of course, where the funding is supported by a specific grant which the authority itself is not permitted to vire), this should not be carried to the point of assimilating the allocations into the school's budget share.

Such earmarked funding from centrally retained funds is to be spent only on the purposes for which it is given, or on other budget heads for which earmarked funding is given, and it not to be vired into the school's budget share.

The authority may require earmarked funds to be returned to the authority if it is not spent within the period stipulated by the authority over which schools are allowed to use the funding. The authority may not make any deduction, in respect of interest costs to the authority, from payments to schools of devolved specific or special grant.

The method of distribution of such funding will reflect its nature and purpose. Details of distribution and accounting procedures will accompany the announcement of each grant.

2.13 Spending for the purposes of the school

Governing bodies are free in accordance with S.50 (3) of the School Standards and Framework Act 1998 to spend budget shares 'for the purposes of the school', subject to regulations made by the Secretary of State and any provisions of this scheme. By virtue of Section 50 (3A) (which came into force on 1 April 2011) amounts spent by governing bodies on community facilities or services under Section 27 of the Education Act 2002 will be treated as if spent for any purposes of the school. Schools may also spend their budgets on pupils who are on the roll of other maintained schools or academies.

2.14 Capital spending from budget shares

Governing bodies are permitted to use their budget shares to meet the cost of capital expenditure on the school premises. This includes expenditure by the governing body of a voluntary aided school on work which is their responsibility under paragraph 3 of Schedule 3 of the Act. Any capital expenditure of this nature must be notified to the authority.

When the authority owns the premises, or the school has voluntary controlled status, then the governing body shall seek the consent of the authority to the proposed works, but such consent can be withheld only on health and safety grounds.

2.15 **Notice of Concern**

The authority may issue a Notice of Concern to the governing body of any school it maintains where, in the opinion of the Chief Finance Officer and the Director of Children's Services, the school has failed to comply with any provisions of the scheme, or where actions need to be taken to safeguard the financial position of the authority or the school.

Such a notice will set out the reasons and evidence for it being made and may place on the governing body restrictions, limitations or prohibitions in relation to the management of funds delegated to it.

These may include:

- insisting that relevant staff undertake appropriate training to address any identified weaknesses in the financial management of the school;
- insisting that an appropriately trained/qualified person chairs the finance committee of the governing body;
- placing more stringent restrictions or conditions on the day to day financial management of a school than the scheme requires for all schools – such as the provision of monthly accounts to the authority;

- insisting on regular financial monitoring meetings at the school attended by authority officers;
- requiring a governing body to buy into a authority's financial management systems; and
- imposing restrictions or limitations on the manner in which a school manages extended school activity funded from within its delegated budget share – for example by requiring a school to submit income projections and/or financial monitoring reports on such activities.

The notice will clearly state what these requirements are and the way in which and the time by which such requirements must be complied with in order for the notice to be withdrawn. It will also state the actions that the authority may take where the governing body does not comply with the notice.

2.16 Schools Financial Value Standard (SFVS)

All local authority maintained schools (including nursery schools and pupil referral units (PRUs) that have a delegated budget) must demonstrate compliance with the Schools Financial Value Standard (SFVS) and complete the assessment form on an annual basis. It is for the school to determine at what time in the year they wish to complete the form. The form should be submitted before the end of the financial year.

Governors must demonstrate compliance through the submission of the SFVS assessment form signed by the Chair of Governors. The form must include a summary of remedial actions with a clear timetable, ensuring that each action has a specified deadline and an agreed owner. Governors must monitor the progress of these actions to ensure that all actions are cleared within specified deadlines.

All maintained schools with a delegated budget must submit the form to the local authority annually.

2.17 **Fraud**

All schools must have a robust system of controls to safeguard themselves against fraudulent or improper use of public money and assets.

The governing body and head teacher must inform all staff of school policies and procedures related to fraud and theft, the controls in place to prevent them; and the consequences of breaching these controls. This information must also be included in induction for new school staff and governors.

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Section 3: Instalments of the budget share: banking arrangements

For the purposes of this section, Budget Share includes any place-led funding for special schools or pupil referral units.

3.1 Frequency of instalments

The budget share will be made available to governing bodies monthly. Top up payments for pupils with high needs should be made on a monthly basis unless alternative arrangements have been agreed with the provider.

3.2 Proportion of budget share payable at each instalment

The proportion of the budget share to be made available to schools will be set out in the advance notifications sent to schools each month.

3.3 Interest clawback

The authority will make a deduction from budget share instalments to cover the estimated interest lost by the authority in making available the budget share in advance. Interest will be calculated at the Bank of England base rate in force at the time of making the advance.

Where the late payment of a budget share instalment is the result of an error by the authority, the authority is required to add interest to late budget share instalment payments. The interest rate used will be the current Bank of England base rate.

3.4 Budget shares for closing schools

Budget shares of schools for which approval for discontinuation has been secured, will be made available until closure on a monthly basis, net of estimated pay costs, even where some different basis was previously used.

3.5 Bank and building society accounts

All schools may have an external bank account into which their budget share instalments (as determined by other provisions) are paid. Where schools have such accounts they shall be allowed to retain all interest payable on the account unless they choose to have an account within an authority contract that makes other provision.

New bank account arrangements may only be made with effect from the beginning of each financial year.

Schools with a deficit budget are not eligible to have a bank account until the deficit is cleared.

If a school opens an external bank account, the authority must, if the school desires, transfer immediately to the account an amount agreed by both the school and the authority as the estimated surplus balance held by the authority in respect of the school's budget share, on the basis that there is then a subsequent correction when accounts for the relevant year are closed.

Any school wishing to opt for its own bank account for the first time may only do so after giving a period of notice of four months before the beginning of the financial year that they wish to opt to a bank account i.e. by 30 November at the latest.

3.5.1 Restrictions on accounts

Accounts may only be held for the purpose of receiving budget share payments, at the banks or building societies as indicated under **Appendix A1**. However, schools with bank accounts with other banks prior to 1 April 2001 must be allowed to retain those accounts.

Any school closing an account used to receive its budget share and opening another must select the new bank or building society from the approved list, even if the closed account was not with an institution on that list.

Schools are allowed to have accounts for budget share purposes that are in the name of the school rather than the authority². However, if a school has such an account, the account mandate must provide that the authority is the owner of the funds in the account; that it is entitled to receive statements; and that it can take control of the account if the school's right to a delegated budget is suspended by the authority.

²Money paid by the authority and held in such accounts remains authority property until spent (s49 (5) of the Act).

3.6 **Borrowing by schools**

Schools fall within the overall borrowing controls of the authority and are governed by the Local Government and Housing Act 1989. Governing bodies may borrow money only with the written permission of the Secretary of State. The Secretary of State's general position is that schools will only be granted permission for borrowing in exceptional circumstances. From time to time, however, the Secretary of State may introduce limited schemes in order to meet broader policy objectives. Schools are able to use any scheme that the Secretary of State has said is available to schools without specific approval, currently including the Salix scheme, which is designed to support energy saving. Schools should contact Phil Kingston on phil_kingston@sandwell.gov.uk or 0121 569 4507 for further information on taking part in the Salix scheme. As part of this, schools will be required to provide a financial forecast which shows that the repayment of the Salix loan is affordable. The forecast should clearly show the assumed energy savings and loan repayments expected by the school.

The restrictions on borrowing do not apply to Trustees and Foundations, whose borrowing, as private bodies, makes no impact on Government accounts. These debts may not be serviced directly from the delegated budgets, but schools are free to agree a charge for a service which the Trustees or Foundation are able to provide as a consequence of their own borrowing. Governing bodies do not act as agents of the authority when repaying loans.

3.7 Other provisions

The authority has formulated separate detailed rules and guidance in respect of other aspects of banking arrangements which are as set out in the **Appendix A**.

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Section 4: The treatment of surplus and deficit balances arising in relation to budget shares

4.1 The right to carry forward surplus balances

Schools may carry forward from one financial year to the next any surplus/deficit in net expenditure relative to the schools budget share for the year plus/minus any balance brought forward from the previous year. A schools opening surplus balance at 1 April is equal to the closing balance at 31 March.

4.2 Controls on surplus balances

In order to allow the authority to monitor excessive balances, governing bodies are required to report to the authority on the use which the school intends to make of surplus balances - after taking account of any retrospective adjustments - in cases where the total balance exceeds (8% primary and special schools) (5% secondary schools) of the schools budget share for the relevant year.

Surplus budget share balances held by schools as permitted under the scheme are subject to the following restrictions with effect from 1 April 2007.

- 4.2.1 The authority shall calculate by the 31 May each year the surplus balance, if any, held by each school as at the preceding 31 March. For this purpose the balance will be the recurrent balance as defined in the consistent financial reporting framework.
- 4.2.2 The authority shall deduct from the calculated balance any amounts for which the school already has a prior year commitment to pay from the surplus balance.

- 4.2.3 The authority shall then deduct from the resulting sum any amounts that the governing body of the school declares to be assigned for specific purposes as permitted by the authority (a list approved by the Schools Forum) and which the authority is satisfied are properly assigned. To count as properly assigned, amounts must not be retained beyond the period stipulated for the purpose in question, without the consent of the authority. In considering whether any sums are properly assigned the authority may also take into account any previously declared assignment of such sums but may not take any change in planned assignments to be the sole reason for considering that a sum is not properly assigned.
- 4.2.4 The suggestion in (4.2.3) above assigned for the specific purposes as permitted by the authority and which the authority is satisfied are properly assigned have been endorsed by the schools forum and are as follows:
 - Contribution towards capital developments
 - Contribution towards curriculum developments
 - Reserve to balance following year's budget
 - Provision for the impact of single status
 - Provision for the impact of equal value
 - Funds from private sources for specific projects
 - Funds held on behalf of partnerships of schools.
 - · Costs to be incurred as part of BSF
 - Remaining intervention fund balance

Schools will be asked to analyse budget share surpluses across these headings. A pro forma will be provided for this purpose which must be approved by governors.

4.2.5 If the result of steps 4.2.1 to 4.2.3 is a sum greater than 8% (for primary and special schools) and 5% (for secondary schools) of the current budget share, then the authority shall deduct, from the current year's budget share, an amount equal to the excess.

- 4.2.6 Funds deriving from sources other than the authority will be taken into account in this calculation if paid into the budget share account of the school, whether under provisions in this scheme or otherwise.
- 4.2.7 Funds held in relation to a school's exercise of powers under Section 27 of the Education Act 2002 (community facilities) will not be taken into account unless added to the budget share surplus by the school as permitted by the authority.
- 4.2.8 The total of any amounts deducted from schools' budget shares by the authority under this provision are to be applied to the schools budget of the authority.

4.3 Interest on surplus balances

Balances held by the authority on behalf of schools will attract interest at the Bank of England base rate of interest received by the council. The interest will be applied to a simple average of opening and closing balances of each individual school at the start and end of each year.

4.4 Obligation to carry forward deficit balances

Deficit balances will be carried forward by the deduction of the relevant amounts from the following year's budget share. A schools deficit balance at 1 April is equal to that at 31 March.

4.5 Planning for deficit budgets

Schools are required to manage within their budget limits and may not **normally** plan for a deficit budget. Any overspending will be deducted from a school's budget share in the following year. The authority may investigate any deficit incurred by a school.

In certain circumstances arrangements may be entered into which allows a school to plan for a deficit. Examples of these circumstances may be:

 Schools can demonstrate that it cannot operate within its total resources (including any balances) and meet the requirements of the national curriculum.

- Where schools wish to pre-empt part of the following year's budget, in order to undertake a major project. The approval of the Chief Finance Officer will be necessary.
- Where there is a significant short-term pupil number shortfall due to known local circumstances.

Any arrangements will need the approval of the authority and will be the subject of a formal agreement signed by the chair of the school governing body, the head teacher and the Chief Finance Officer.

Before approving any arrangements the Chief Finance Officer will require the governing body of the school to produce a financial and operational plan which takes into account all known factors and results in a balanced budget, normally within three years from the start of the plan.

The school will be supported in this procedure by a team of officers from the authority, including the school's adviser budget officer (except where the school has an external financial adviser). This will normally take place between the notification of the school's budget share at the end of February each year and the requirement to submit a financial plan by 15 May each year.

The maximum deficit that will be agreed will be **no greater than 30%** of a school's budget share.

Detailed administrative procedures which will be required before approving any agreement can be found in **Appendix H**.

4.6 Charging of interest on deficit balances

The authority may charge interest on any deficit balance but the Chief Finance Officer may waive these charges where agreed budget recovery plans are in place.

The authority will charge interest on deficit budgets in circumstances where the size of the deficit rises above the level of any deficit agreed in a financial plan between the authority or the governing body or where there is an unplanned deficit.

The basis of the calculation of interest will be to a simple average of opening and closing balances of each individual school. The interest charged would be the Bank of England base rate of interest paid on surplus balances.

4.7 Writing off deficits

The authority has no power to write off the deficit balance of any school.

4.8 Balances of closing and amalgamating schools

When a school closes any balance (whether surplus or deficit) shall revert to the authority; it cannot be transferred as a balance to any other school, even where a school is a successor to the closing school.

The allocation regulations made under section 47 of the School Standards and Framework Act 1998 make provision for authorities, if they wish, to make allocations to schools which have the effect of giving them the benefit of additional sums which are more than less than the balances of relevant closing schools. The regulations also provide for the amount of extra funding for new schools to recognise the deficit of a preceding school by being reduced; but they do not allow a sum equal to the deficit to be set against any normal funding of the new school – that is the elements of funding it would receive anyway if it was not new.

Surplus balances of schools converting to academy status under section 4(1)(a) of the Academies Act 2010 transfer to the academy. Deficit balances of schools converting to academy status under Section 4(1)(a) of the Academies Act 2010 will be notified to the EFA (or replacement body) who will deduct this from the academy's funding and repay the authority.

4.9 Licensed deficits

See 4.5 above and **Appendix H**.

4.10 Loan scheme

The authority operates a loan scheme for schools experiencing significant cash flow difficulties. This is detailed further in section 9 of **Appendix A.**

4.11 Credit union approach

Schools may wish to group together to utilise externally held balances for a credit union approach to loans. Where schools choose to borrow money through such a scheme the authority will require audit certification of the running of the scheme, unless the authority itself acts as administrator of the arrangement.

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Section 5: Income

Schools shall be able to retain income except in certain specified circumstances.

5.1 **Income from lettings**

Schools may retain income from lettings of the school premises that would otherwise accrue to the authority, subject to alternative provisions arising from any joint use or PFI agreements. Schools are permitted to cross-subsidise lettings for community and voluntary use with income from other lettings, provided the governing body is satisfied that this will not interfere to a significant extent with the performance of any duties imposed on them by the Education Acts, including the requirement to conduct the school with a view to promoting high standards of educational achievement. However, schools should be required to have regard to directions issued by the authority as to the use of school premises, as permitted under the Act for various categories of schools.

Schools whose premises are owned by the authority shall be required to have regard to directions issued by the authority, as permitted under the School Standards and Framework Act 1998, as to the use of school premises. The authority have issued directions requiring governors to give priority to the use of school premises outside school hours for adult education, youth, mother tongue teaching (e.g. mother tongue teaching project) and other needs concerned with the education and welfare of young people. Schools will be reimbursed for these lettings.

Income from lettings should not be payable into voluntary or private funds held by the school. <u>However, where land is held by a charitable trust, it will be for the school's trustees to determine the use of any income generated by the land.</u>

5.2 Income from fees and charges

Schools may retain income from fees and charges except where a service is provided by the authority from centrally retained funds. Schools are required to have regard to any policy statements on charging produced by the authority.

5.3 Income from fund-raising activities

Schools may retain income from fund-raising activities.

5.4 Income from the sale of assets

Schools may retain the proceeds of sale of assets except in cases where the asset was purchased with non-delegated funds (in which case it should be for the authority to decide whether the school should retain the proceeds), or the asset concerned is land or buildings forming part of the school premises and is owned by the authority.

5.5 Administrative procedures for the collection of income

Because of the potential VAT implications of providing services that lead to fees and charges, fund-raising activities and the sale of assets, the authority has established administrative procedures for the collection of income that are set out in **Appendix A.**

5.6 Purposes for which income may be used

Income from the sale of assets purchased with delegated funds may only be spent for the purposes of the school.

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Section 6: The charging of school budget shares

6.1 **General provision**

The authority must charge the salaries of school based staff to the budget share of a school at actual cost otherwise the budget share of a school may be charged by the authority without the consent of the governing body only in circumstances set out in 6.2 below.

The authority shall consult a school as to the intention to so charge, and shall notify a school when it has been done.

Schools are reminded that the authority cannot act unreasonably in the exercise of any power given by this scheme, or it may be the subject of a direction under s.496 of the Education Act 1996.

The authority shall make arrangements for a disputes procedure for such charges.

For the avoidance of doubt, local authorities may de-delegate funding for permitted services without the express permission of the governing body, provided this has been approved by the appropriate phase representative of the Schools Forum.

6.2 Circumstances where charges may be made

- 6.2.1 When premature retirement costs have been incurred without the prior written agreement of the authority to bear such costs (the amount chargeable being only the excess over any amount agreed by the authority).
- 6.2.2 Other expenditure incurred to secure resignations where the school had not followed authority advice. Other expenditure incurred to secure resignations where there is good reason to charge this to the school (see Annex B)
- 6.2.3 Awards by courts and industrial tribunals against the authority, or out of court settlements, arising from action or inaction by the governing body contrary to authority advice.
- 6.2.4 Expenditure by the authority in carrying out health and safety work or capital expenditure for which the authority is liable where funds have been delegated to the governing body for such work, but the governing body has failed to carry out the required work.

- 6.2.5 Expenditure by the authority incurred in making good defects in building work funded by capital spending from budget shares, where the authority owns the premises, or the school has voluntary controlled status.
- 6.2.6 Expenditure incurred by the authority in insuring its own interests in a school where funding has been delegated but the school has failed to demonstrate that it has arranged cover at last as good as that which would be arranged by the authority.
- 6.2.7 Recovery of monies due from a school for services provided to the school (including the provision of authority advice), where a dispute over the monies due has been referred to a dispute procedure set out in a service level agreement, and the result is that monies are owed by the school to the authority.
- 6.2.8 Recovery of penalties imposed on the authority by the Board of Inland Revenue, the Contributions Agency, HM Revenue and Customs, Teachers' Pensions, the Environment Agency or regulatory authorities as a result of school negligence.
- 6.2.9 Correction of authority errors in calculating charges to a budget share (e.g. pension deductions).
- 6.2.10 Additional transport costs incurred by the authority arising from decisions by the governing body on the length of the school day, and failure to notify the authority of non-pupil days resulting in unnecessary transport costs.
- 6.2.11 Legal costs that the authority incurs because the governing body did not obtain and follow authority Advice (see also Section 11).
- 6.2.12 Costs of necessary health and safety training for staff employed by the authority, where funding for training has been delegated, but the necessary training not carried out.
- 6.2.13 Compensation paid to a lender where a school enters into a contract for borrowing beyond its legal powers, and the contract is of no effect.
- 6.2.14 Cost of work done in respect of teacher pension remittance and records for schools using non-authority payroll contractors, the charge to be the minimum needed to meet the cost of the authority's compliance with its statutory obligations.

- 6.2.15 Costs incurred by the authority in securing provision specified in a statement of SEN where the governing body of a school fails to secure such provision despite the delegation of funds in respect of low cost high incidents SEN and/or specific funding for a pupil with high needs.
- 6.2.16 Costs incurred by the authority due to submission by the school of incorrect data. Under the scheme for financing schools, schools will be the prime source for data about pupils entering, attending and leaving their school and their performance. If schools fail to maintain adequate records or provide the authority with incorrect data, the authority reserves the right to ensure that adequate records required by the authority are available to the authority and to charge schools the actual cost of putting that right. Additionally, the authority reserves the right to charge schools for the actual cost incurred by the authority of correcting any incorrect data provided by the school.
- 6.2.17 Recovery of amounts spent from specific grants on ineligible purposes.
- 6.2.18 Costs incurred by the authority as a result of the governing body being in breach of terms of contract including costs or charges incurred by the authority as a result of the governing body entering into a contract on behalf of the authority. (See 2.11B of this scheme)
- 6.2.19 Costs incurred by the authority as a result of any breach or non-compliance by any governing body of a maintained school with any of the terms of this Scheme.
- 6.2.20 Costs incurred by the authority or another school as a result of a school withdrawing from a cluster arrangement, for example where this has funded staff providing services across the cluster.
- 6.2.21 Costs incurred by the authority in administering appeals, where the local authority is the admissions authority and the funding for admission appeals has been delegated to schools as part of their formula allocation.

6.3 Equal pay claims

6.3.1 Historical background and context

Claims for back pay relate to the 1987 national job evaluation scheme for manual employees in which bonus payments were retained for male staff. Equal pay claims are from female job groups using a male bonus earner as a comparator. The settlement of equal pay claims represents a council wide issue, however, within schools the main job groups affected are learning support assistants, learning support practitioners and lunchtime supervisory staff.

The council has followed best practice guidance issued by the DcSF³

A collective solution has been reached with the council and schools which represents a culmination of extensive discussion and consultation with schools and key stakeholder groups.

As a result of the collective solution reached, schools will contribute £10m towards the total settlement for the council (estimated in excess of £40m including settlements for school-based staff in excess of £22m).

Borrowing approval has been obtained from Central Government which will allow authorities to treat such amounts as capital. The council has received specific approval to borrow which includes the element for schools. Schools would effectively make an annual contribution equal to a repayment period of 15 years.⁴

6.3.2 Outcome

At the meeting of the schools forum on 8 December 2008, members agreed a final cost apportionment model that was based on the "collective principle". The total liability to schools was £10m.

³ DcSF Guidance on back pay for education staff - Issued March 2008.

⁴ Interest rate 5%, with a PV annuity factor of 10.37966

The final decision of the forum was backed by an assurance from the council that there will be no surcharges to schools over the lifetime of the agreement as a result of any future school reorganisations, or the creation of new academies, foundation or trust schools. In addition the council has given a commitment to schools that the £10m total schools liability will be fixed, and they will be protected against the outcome of any future claims or grievances.

The final decision of the forum was based on a balanced view. The forum's imperative was to see this as a collective response to a collective problem, protecting individual schools from any excessive financial burdens arising from their individual circumstances particularly from SEN and other specialist provision.

Schools contributions to equal pay settlements are shown in "Appendix I".

- Column A: The annual contribution payable for 15 years for those schools that have chosen this option. Annual contributions will be shown as a charge against a schools' individual budget share each year with effect from 1 April 2009, for a 15-year period.
- Column B: The total financial liability over a 15-year repayment period for those schools that have chosen this option.
- Column C⁵: The total liability based on a "one-off" single payment from school reserves for those schools that have chosen this option. This will be a one-off charge against a schools' individual budget share on 1 April 2009

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⁵ This is the cheaper option in the long-term for schools as it excludes the interest element that is associated with the annual repayment option.

Section 7: Taxation

7.1 Value Added Tax (VAT)

The authority has established procedures to enable schools to utilise the authority's ability to reclaim VAT on expenditure relating to non-business activity.

Schools covered by the scope of this scheme are part of the authority for VAT purposes and must not attempt to register for VAT in connection with activities involving the use of delegated budgets.

Schools without bank accounts will be covered by the procedures for VAT contained in the authority's Financial Regulations.

For schools that have bank accounts the conditions that apply are set out in **Appendix A.**

Amounts reclaimed through these procedures will be passed back to the school.

7.2 Construction Industry Taxation Scheme (CIS)

Schools are required to abide by procedures issued by the authority in connection with CIS.

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Section 8: The provision of services and facilities by the authority

8.1 Provision of services from centrally retained budgets

The authority shall determine on what basis services from centrally retained funds will be provided to schools, but the authority is debarred from discriminating in its provision of services⁶ on the basis of categories of schools except where such discrimination is justified by differences in statutory duties. this would be permitted under the School and Early Years Finance Regulations or the dedicated schools grant conditions of grant.

8.2 Provision of services bought back from the authority using delegated budgets

The terms of any arrangement with a school to buy services or facilities from the authority shall be limited to a maximum of three years from the inception of the scheme or the date of the agreement, whichever is the later, and periods not exceeding five years for any subsequent agreement relating to the same services.

However, this can be extended to five and seven years respectively for contracts for the supply of catering services.

There is no minimum period, although arrangements lasting less than 2 eyars may well be uneconomic.

When a service is provided for which expenditure is not retained centrally by the authority under Regulations made under section 45A of the Act, it must be offered at prices that are intended to generate income that is no less than the cost of providing those services. The total cost of the service must be met by the total income, even if schools are charged differentially. Whilst it is recognised that absolute break-even or profit is not always achievable over fixed financial years, it is for the authority to show during audit tests that the charging policy can reasonably be expected to avoid central subsidy of services.

⁶The term services in this paragraph includes existing PRC and redundancy payments but excludes centrally funded premises and liability insurance.

8.2.1 **Packaging**

The authority may provide any services for which funding has been delegated but where the authority is offering the service on a buyback basis it will do so in a way that does not unreasonably restrict schools' freedom of choice among the services available.

8.3 Service level agreements

If services or facilities are provided under a service level agreement - whether free or on a buyback basis - the terms of any such agreement starting on or after the inception of the scheme will be reviewed at least every three years if the agreement lasts longer than that.

Services, if offered at all by the authority, shall be available on a basis that is not related to an extended agreement, as well as on the basis of such agreements.

Where services are provided on an ad hoc basis, they may be charged for at a different rate than if provided on the basis of an extended agreement.

Service level agreements must be in place by 31 March to be effective for the next financial year. Schools must have at least a month to consider the terms of the agreement.

The above guidance excludes centrally arranged premises and liability insurance.

8.4 Teachers' pensions

The Governing Bodies of schools wihich provide payroll services should submit a monthly return of salary and service to the authority.

In order to ensure that the performance of the duty on the authority to supply teachers pensions with information under the Teachers' Pensions Regulations 1997, and non teachers pensions under the local government pension scheme, the following conditions are imposed on the authority and governing bodies of all maintained schools covered by this scheme in relation to their budget shares.

The conditions only apply to governing bodies of maintained schools that have **not** entered into an arrangement with the authority to provide payroll services.

A governing body of any maintained school, whether or not the employer of the teachers at such a school, which has entered into any arrangement or agreement with a person other than the authority to provide payroll services, shall ensure that any such arrangement or agreement is varied to require that person to supply salary, service and pensions data to the authority which the authority requires to submit its annual_monthly return of salary and service to Teachers' Pensions and non teachers pensions and to produce its audited contributions certificate.

The authority will advise schools each year of the timing, format and specification of the information required. A governing body shall also ensure that any such arrangement or agreement is varied to require that additional voluntary contributions (AVCs) be passed to the authority within the time limit specified in the AVC scheme. The governing body shall meet any consequential costs from the school's budget share.

A governing body of any maintained school which directly administers its payroll shall supply salary, service and pensions data to the authority which the authority requires to submit its annual_monthly return of salary and service to Teachers' Pensions and non teachers' pensions and to produce its audited contributions certificate.

The authority will advise schools each year of the timing, format and specification of the information required from each school. A governing body shall also ensure that additional voluntary contributions (AVCs) are passed to the authority within the time limit specified in the AVC scheme. The governing body shall meet any consequential costs from the school's budget share.

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Section 9: Private Finance Initiative (PFI)/Public Private Partnership (PPP)

9.1 The authority shall have the power to issue regulations from time to time relating to PFI/PPP projects. Amongst other issues these may deal with the reaching of agreements with the governing bodies of schools as to the basis of charges relating to such schemes; and the treatment of monies withheld from contractors due to poor performance.

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Section 10: Insurance

10.1 Insurance cover

The authority currently arranges the insurance cover for all maintained schools. However, if a school decides to opt out of this service and arrange separate cover it must be able to demonstrate that the cover is equivalent to the level that would have been arranged by the authority.

The evidence required to demonstrate the parity of cover should be reasonable, and should not place an undue burden upon the school, nor act as a barrier to the school exercising their choice of supplier.

The authority will have regard to the actual risks which might reasonably be expected to arise at the school in question in operating such a requirement, rather than applying an arbitrary minimum level of cover for all schools.

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Section 11: Miscellaneous

11.1 Right of access to information

Governing bodies shall supply to the authority all financial and other information which might reasonably be required to enable the authority to satisfy itself as to the school's management of its delegated budget share, or the use made of any central expenditure by the authority (e.g. earmarked funds) on the school.

11.2 Liability of governors

Because the governing body is a corporate body, and because of the terms of s.50(7) of the Act, governors of maintained schools will not incur personal liability in the exercise of their power to spend the delegated budget share provided they act in good faith.

An example of behaviour which is not in good faith is the carrying out of fraudulent acts.

11.3 Governors' expenses

The authority shall have the power to delegate to the governing body of a school yet to receive a delegated budget, funds to meet governors' expenses.

Only allowances in respect of purposes specified in regulations set out in section 19 of the Education Act 2002 may be paid to governors from a school's delegated budget share. Schools are expressly forbidden from paying any other allowances to governors.

Schools are also barred from payment of expenses duplicating those paid by the Secretary of State to additional governors appointed by him to schools under special measures.

11.4 Responsibility for legal costs

Any costs of legal actions, incurred by the governing body or costs awarded against the authority, although the responsibility of the authority as part of the cost of maintaining the school (unless they relate to the statutory responsibility of aided school governors for buildings) may be charged to the school's budget share unless the governing body acts in accordance with the advice of the authority.

In the case of a conflict between the governing body and the authority schools should take advice from an external body such as national association of governors and managers; the institute of school and college governors; the national governors' council or any appropriate independent legal body.

11.5 **Health and safety**

Governing bodies are required, in expending the school budget share, to have due regard to duties placed on the authority in relation to health and safety, and the authority's policy on health and safety matters in the management of the budget share.

11.6 Right of attendance of Chief Finance Officer

Governing bodies are required to permit the Chief Finance Officer of the authority or any officer nominated by the Chief Finance Officer to attend meetings of the governing body at which any agenda items are relevant to the exercise of her or his responsibilities.

The Chief Finance Officer attendance shall normally be limited to items that relate to issues of probity or overall financial management and shall not be regarded as routine.

The authority will give prior notice of such attendance unless this is impracticable.

11.7 Special educational needs

Schools are required to use their best endeavours in spending their budget share, to secure the special educational needs of their pupils. Failure to do so, if serious enough, would be a reason for suspending delegation to a school.

11.8 Interest on late payments

The authority wishes to remind schools that interest on late payments make become applicable in line with statutory requirements.

11.98 'Whistleblowing'

The procedure to be followed by persons working at a school or school governors who wish to complain about financial management or financial propriety at the school, and how such complaints will be dealt with is set out in **Appendix B**.

11.109 Child protection

Schools must release staff to attend child protection case conferences and other related events. The cost of these will be borne from the school budget share.

11.110 Redundancy/retirement costs

Appendix K provides guidance 2002 Education Act requirements about how premature retirement and redundancy costs should normally be funded.

Section 37 of the Education Act 2002 states that: -

- The cost of premature retirements will be met by the schools' budget share unless the local authority agrees to meet the cost.
- The cost of redundancy will be met by the local authority unless there is good reason for the costs to be charged to the school's budget share.

The authority will consider requests to fund all or part of the redundancy costs due to be incurred on a case by case basis. Schools are required to make a business case to Children's Services Divisional Management Team (DMT) if they wish to

request financial support. DMT will consult officers from Finance, HR and Learning Services as part of this consideration.

DMT will judge every case on its merits but consider the following to be good reasons for redundancy costs to be met by the school and not the local authority:

- 1. The school has not received an 'in principle' agreement from the authority to fund the redundancy costs at the start of the process.
- 2. The school has not followed LA advice which could have avoided the need to make redundancies e.g. making use of short term contracts where possible.
- 3. The LA procedures regarding Redundancy and Redeployment of staff have not been followed.
- 4. The LA does not agree that the redundancies are necessary to set a balanced budget or address the requirements of a licensed deficit.
- 5. The proposed redundancy payments are higher than the LA would expect.
- 6. The school holds balances which could be reasonably used to fund the redundancy costs.

11.1<u>2</u>4 Leasing

The Chief Finance Officer has, on behalf of Sandwell schools, approved a leasing framework with Unilink Finance for the lease of school equipment. (See **Appendix N** for framework agreement).

Governing bodies and head teachers should ensure that: -

- No leasing contract exceeds a period of 3 years.
- Quotes for leases are obtained in accordance with the authority's Contract and Procurement Procedure Rules.
- Leasing arrangements are not entered into without the prior agreement of the Chief Finance Officer,

11.12 Information for Maintained schools involved in outsourcing

The authority is aware that schools are examining different service delivery models, which could entail the outsourcing of services.

Where the outsourcing of services involves TUPE transfer of any council employees who are members or are entitled to be members of the Local Government Pension Scheme (LGPS), there will be pension implications which should be considered as part of the tender process.

There is a responsibility for schools to be fully aware of pension procedures and protocols early on in any tendering process

Schools considering outsourcing a service should contact the following bodies/teams at the earliest opportunity to ensure any pension implications are understood and considered at the outset of any tendering process.

- Schools Strategic Finance Unit (SSFU)
- Local authority HR Team
- Local authority Legal team

Once all the relevant information has been received, the authority will contact the West Midlands Pension Scheme.

This will help to ensure that the proper processes are followed and the school can factor in any pension issues and costs in their tender documents and potential contractors can price these costs accurately into their bids. This will avoid potential and unnecessary delays and complications at the latter stages of the tender process or after the contract has been awarded.

Section 12: Responsibility for repairs and maintenance

- 12.1 The authority delegates all funding for repairs and maintenance to schools⁷.
- The authority, when defining Capital and Revenue as far as repairs and maintenance is concerned, does not use a *de minimis* level.
- 12.3 For voluntary aided schools, the liability of the authority for repairs and maintenance (albeit met by delegation of funds through the budget share) is the same as for other maintained schools, and no separate list of responsibilities is necessary for such schools. However, eligibility for capital grant from the Secretary of State for capital works at voluntary aided schools depends on the deminimus limit applied by the DfE to categorise such work, not the de-minimus limit used by the authority.

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⁷ For these purposes, expenditure may be treated as capital only if it fits the definition of capital used by the local authority for financial accounting purposes in line with the CIPFA Code of Practice on local authority accounting. The actual interpretation of the Code is a matter for the local authority.

Section 13: The community facilities power

13.04 Schools which choose to exercise the power conferred by s.27 (1) of the Education Act 2002 to provide community facilities will be subject to a range of controls. First, Regulations made under s.28 (2), if made, can specify activities which may not be undertaken at all under the main enabling power. Secondly, athe school is no longer obliged to consult before establishing community facilities and there is no longer a need for a school to be mindful of local authority advice, its authority and have regard to advice from the authority. Thirdly, Thethe school is no longer required to have regard to advice or guidance from the -Secretary of State or their local authority when offering this type of provision issues guidance to governing bodies about a range of issues connected with exercise of the power, and a school must have regard to that.

The mismanagement of community facilities funds can be grounds for suspension of the right to a delegated budget. This provision is discretionary because the power to suspend delegation, and the procedure to be used, arise from primary legislation, not the scheme itself.

However, under s.28(1), the main limitations and restrictions on the power will be those contained in the maintaining authority's scheme for financing schools made under section 48 of the School Standards and Framework Act 1998 as amended by paragraph 2 of schedule 3 to the Education Act 2002. This amendment extended the coverage of schemes to include the exercise of the powers of governing bodies to provide community facilities.

Schools are therefore subject to prohibitions, restrictions and limitations in the scheme for financing schools.

This part of the scheme does not extend to joint-use agreements; transfer of control agreements, or agreements between the authority and schools to secure the provision of adult and community learning.

An appendix to the scheme for financing of maintained schools, covering financial issues from the prospective use by school

governing bodies of the community facilities power contained in sections 27 and 28 of the Education Act are specified in **Appendix C** of this scheme.

13.1 Consultation with the authority: financial aspects

Changes made by the Children and Families Act 2014 mean that schools no longer need to consult the authority when establishing community facilities under Section 27 of the Education Act 2002. Nor do they have to have regard to advice given to them by their authority.

However, as public bodies, they are expected to act reasonably, and this includes consulting those affected by decisions that they make.

13.2 Funding agreements: authority powers

The provision of community facilities in many schools may be dependent on the conclusion of a funding agreement with a third party which will either be supplying funding or supplying funding and taking part on the provision. A very wide range of bodies and organisations are potentially involved.

The scheme should include a provision describing the authority's requirements in relation to funding agreements with third parties, as opposed to funding agreements with the authority itself.

The authority may impose a requirement that any such proposed agreement should be submitted to the authority for its comments, and may impose a time requirement for doing so to give the authority adequate notice.

However, the scheme may not impose a right of veto for the authority on such agreements, either directly or through requiring a right to countersign the agreement. If the third party requires authority consent to the agreement for it to proceed, such a requirement and the method by which authority consent is to be signified is a matter for that third party, not for the scheme.

The Secretary of State does not consider that it is appropriate for authorities to have a general power of veto for these agreements.

However, if an agreement has been or is to be concluded against the wishes of the authority, or has been concluded without informing the authority, which in the view of the authority is seriously prejudicial to the interests of the school or the authority,

that may constitute grounds for suspension of the right to a delegated budget.

13.3 Other prohibitions, restrictions and limitations

Although the authority should not give a right of veto either to funding agreements with third parties, or for other proposed uses of the community facilities power, the scheme may make provision for the authority to require that in a specific instance of use of the community facilities power by a governing body, the governing body concerned must make arrangements to protect the financial interests of the authority by either carrying out the activity concerned through the vehicle of a limited company formed for the purpose, or by obtaining indemnity insurance for risks associated with the project in question, as specified by the authority.

If the authority has such a provision in its scheme it should operate it in a reasonable fashion, imposing such a requirement only where it has good reason to believe that the proposed project carries significant financial risks.

Section 28 provides that the exercise of the community facilities power is subject to prohibitions, restrictions and limitations in the scheme for financing schools.

The authority may propose other scheme provisions of that nature which they believe necessary. The restrictions should only be in existence if they are necessary to safeguard the financial position of the authority or school, or to protect pupil welfare or education; such provisions should be as few in number as possible.

13.4 Supply of financial information

The authority will require schools which exercise the community facilities power to provide the authority every 6 months with a summary statement, in a form determined by the authority, showing the income and expenditure for the school arising from the facilities in question for the previous 6 months and on an estimated basis, for the next 6 months.

The authority requires, on giving notice to the school that it believes there to be cause for concern as to the school's

management of the financial consequences of the exercise of the community facilities power, to require such financial statements to be supplied every three months and, if the authority sees fit, to require the submission of a recovery plan for the activity in question.

Financial information relating to community facilities will be included in returns made by schools under the consistent financial reporting (CFR) framework, and these should be relied upon by authorities as their main source of information for the financial aspects of community facilities.

However, the CFR timetable is such that the authority will want supplementary information in order to ensure that schools are not at financial risk. Schedule 15 of the act provides that mismanagement of funds spent or received for community facilities is a basis for suspension of the right to delegation of the budget share.

These provisions do not preclude the insertion of other provisions in specific funding agreements between schools and the authority as to the financial reporting requirements arising from the funding in question.

13.5 **Audit**

The authority is requires the school to grant access to the school's records connected with exercise of the community facilities power, in order to facilitate internal and external audit of relevant income and expenditure.

The authority requires schools, in concluding funding agreements with other persons pursuant to the exercise of the community facilities power, to ensure that such agreements contain adequate provision for access by the authority to the records and other property of those persons held on the school premises, or held elsewhere insofar as they relate to the activity in question, in order for the authority to satisfy itself as to the propriety of expenditure on the facilities in question.

13.6 Treatment of income and surpluses

Schools will be allowed to retain all net income derived from community facilities except where otherwise agreed with a

<u>funding provider, whether that be the authority or some other</u> person.

The schools will be allowed to carry such retained net income over from one financial year to the next as a separate community facilities surplus.

13.7 **Health and safety**

Any and all health and safety provisions of the main scheme are extended to the community facilities power.

The governing body will have responsibility for the costs of securing Disclosure and Barring Service clearance, where appropriate for all adults involved in community activities taking place during the school day.

Governing bodies would be free to pass on such costs to a funding partner as part of an agreement with that partner.

13.8 **Insurance**

It is the responsibility of the governing body to ensure adequate arrangements are made for insurance against risks arising from the exercise of the community facilities power, taking professional advice as necessary.

The school seek the authority's advice before finalising any insurance arrangement for community facilities.

In principle, the insurance issues arising from use of the community facilities power are the same as those which already arise from non-school use of school premises. However, a school proposing to provide community facilities should, as an integral part of its plans, undertake an assessment of the insurance implications and costs, seeking professional advice if necessary.

The authority may undertake its own assessment of the insurance arrangements made by a school in respect of community facilities, and if it judges those arrangements to be inadequate, make arrangements itself and charge the resultant cost to the school.

This provision is necessary in order for the authority to protect itself against possible third party claims.

13.9 **Taxation**

Schools should seek the advice of the authority and the local VAT office on any issues relating to the possible imposition of VAT on expenditure in connection with community facilities, including the use of the local authority VAT reclaim facility.

Schools are reminded that if any member of staff employed by the school or authority in connection with community facilities at the school is paid from funds held in a school's own bank account, whether a separate account is used for community facilities or not, the school is likely to be held liable for payment of income tax and national insurance, in line with HMRC rules.

Schools are to seek and follow authority advice in relation to the CIS where this is relevant to the exercise of the community facilities power.

<u>13.10 **Banking**</u>

The requirements of the authority as to the banking arrangements which schools should make in connection with the community facilities power are as set out in Appendix A "School Bank Account Scheme".

Schools must not borrow money without the written consent of the Secretary of State. This requirement does not extend to monies lent to schools by their maintaining authority.