

ROYAL BOROUGH OF WINDSOR & MAIDENHEAD SCHOOLS FORUM

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| Date: | 19 January 2016 | | |
| Title: | Growth fund and falling rolls fund | | |
| Responsible officer: | Kevin McDaniel, Head of Schools and Educational Services | | |
| Contact officer: | Edmund Bradley, Finance Partner Ben Wright, Education Planning Officer | Email E-mail | Edmund.bradley@rbwm.gov.uk Ben.wright@rbwm.gov.uk |

1 REPORT SUMMARY

- 1.1 This discussion paper provides information and seeks initial views on:
- Plans to postpone in-year adjustments to growth fund allocations which were to be introduced for the first time in 2015-16, following discussion at Schools Forum in October 2014.
 - Possible changes to the operation of RBWM's growth fund and the criteria for allocating funding.
 - Possible introduction of a falling rolls fund to support good and outstanding schools which see a temporary reduction in pupils, as set out in DfE funding guidance.
- 1.2 Depending on the feedback from members of the Forum, more detailed proposals will be brought back to Schools Forum in March 2016 for a decision if warranted.

2 RECOMMENDATIONS

- 2.1 To comment on the proposals in this paper and offer RBWM officers a steer to undertake further exploratory work.

3 GROWTH FUND

- 3.1 Local authorities (LAs) can topslice the Dedicated Schools Grant (DSG) in order to create a growth fund to support maintained and academy schools which are required to provide extra places in order to meet basic need within the authority.
- 3.2 The growth fund can only be used to:
- Support growth in pre-16 pupil numbers
 - Additional classes needed to meet the infant class size regulation
 - To meet the start-up costs of new schools. Funding is intended to support growing schools to meet the cost of additional pupils admitted in the new academic year who would not be funded through the funding formula.¹
- 3.3 It cannot be used to support schools in financial difficulty which for maintained schools would normally come from a de-delegated contingency budget.

¹ Regulations require LAs to provide estimated numbers in the funding formula for new schools which have opened in the last seven years and do not yet have pupils in every year group. In RBWM this applies to Braywick Court and Holyport College and means that the additional pupils they expect in September 2016 will be funded through the formula and not through the growth fund.

- 3.4 In October 2014 Schools Forum agreed changes to RBWM's growth fund allocation criteria as follows:
- Funding for permanent increases would only be allocated for the first three years of any increase. Previously funding was allocated for a full seven years in the case of an expanding primary school.
 - That funding will only be allocated for planned increases of ten or more school places. Previously there was no limit.
 - That a lump sum of £4,000 per school, for increases of ten or more pupils, and £6,000 for twenty or more, pro rata-ed for part year, would be allocated in addition to the per pupil funding based on AWPU. Previously funding was based on the per pupil amount only.
 - That an allocation would take account of the difference between planned pupil numbers and actual pupils admitted in September. Previously schools got additional funding for planned increases, even when the actual increase in pupil numbers was significantly less than planned.
- 3.5 RBWM's existing growth fund criteria are set out at annex A and the indicative allocations for 2016-17 are shown in Annex B.
- 3.6 2015-16 was the first year that growth fund allocations would be subject to an in-year adjustment to take account of the difference between leavers and joiners. This adjustment has not yet been actioned. Our initial modelling of the adjustments needed suggest that in-year clawbacks in some schools would be of a size that would destabilise financial planning. In some cases the clawback could be as much as £30k. It is also difficult for a school to reduce staff costs mid-year where it has already employed an additional teacher in anticipation of extra pupils and has published the additional capacity.
- 3.7 Our proposal for 2015-16 is therefore not to action any clawbacks in respect of 2015-16 growth fund allocations until the new financial year 2016-17, and to take the opportunity between now and March to further review the effectiveness of the existing growth fund criteria with the ambition of increasing the predictability of the finances for schools which expand. Such a review could consider:
- Removing the reclaim element entirely.
 - Reducing the initial growth fund allocation to better reflect unavoidable costs.
 - The impact of the three year limit.
- 3.8 Schools Forum members are asked to give their initial views on the need to review the arrangements and the proposed and other considerations.

4 FALLING ROLLS FUND

What is a falling rolls fund

- 4.1 LAs can top-slice the DSG to create a fund to support schools that have falling rolls, as set out in the EFA document [Schools revenue funding 2016 to 2017 Operational guide version 2 \(December 2015\)](#). Paragraph 78 states:

“Local Authorities may top-slice the DSG in order to create a small fund to support good schools with falling rolls, where local planning data show that the surplus places will be needed within the next three financial years. The schools forum should agree both the value of the top-slice and the criteria for allocation, and the local authority should regularly update the schools forum on the use of the funding.”

- 4.2 The purpose of the fund, therefore, is to offset temporary reductions in school budgets caused by short-term reductions in pupil numbers. In this way, the fund can help avoid the need to make staff redundant, only to have to employ new staff within two or three

years. The fund is not intended to address budgetary issues arising from longer term declining demand.

Why might it be relevant to RBWM?

- 4.3 Falling rolls have not, in the main, been an issue within RBWM in recent years and, indeed, the borough is now expecting a period of significant growth in demand for secondary, middle and upper schools. There are, however, some possible circumstances in which such a fund might be desirable:

(a) Falling demand for primary school places.

The birth rate in RBWM has fallen in 2012/13 and 2013/14², with the result that the demand for Reception places in primary schools in the borough are set to fall in 2017 and 2018, see table 1. At this stage, it is not known whether underlying demand will pick-up again beyond 2018, or what the impact will be of new housing targets yet to be agreed through the Borough Local Plan process. It is potentially possible; therefore, that some good or outstanding primary or first schools will have surplus places in 2017 and/or 2018, that would then be needed in subsequent years. Of course, if the fall in demand is shown to be longer term, then it will be necessary to consider whether a reduction in the number of available places would be a more appropriate response than budget support.

Table 1: Primary demand

| 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
|-------------|-------------|-------------|-------------|-------------|-------------|
| 1,649 | 1,690 | 1,677 | 1,726 | 1,586 | 1,536 |

(b) Falling demand through the opening of new schools beyond the local “Basic Need” provision.

Over the past five years, four secondary free schools have opened in Slough, providing 17 new forms of entry (FE) at Year 7. Slough is experiencing very significant population growth, but the four schools have opened ahead of need, leading to a surplus of around 7 FE (210 places) in September 2015. This has an impact on secondary schools within the Royal Borough, with much lower demand for places at Churchmead CE Secondary School than previously expected. Slough will need all of these places, and more, within the next few years, which will reverse the falling rolls at Churchmead. Similar issues could arise elsewhere if further new schools are opened in neighbouring local authority areas where there is no immediate need. With a national target for 500 new free schools by 2019, this situation should be considered possible.

The 10% surplus places policy

- 4.4 In considering such a fund, however, it is important to remember that RBWM's Cabinet seeks a surplus of 10%. Any falling rolls fund would, therefore, need to be calibrated with this in mind. The 10% surplus are to:

- Allow for the operation of parental preference.
- Maintain places for families moving into the borough.
- Provide headroom in case demand is higher than expected.

Criteria for a falling rolls fund

- 4.5 The EFA guidance sets out some criteria for allocating a falling rolls fund, noting that the trigger points should be clear and objective. There is one mandatory criteria: Support is available only for schools judged Good or Outstanding at their last Ofsted.

- 4.6 The guidance suggests potential criteria which includes:

² Information for 2014/15 is not yet available.

- Surplus capacity exceeds x pupils or x% of the published admission number.
- Local planning data shows a requirement for at least x% of the surplus places within the next three years.
- Formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort.
- The school will need to make redundancies in order to contain spending within its formula budget.

- 4.7 The formula for allocating funding to qualifying schools should be similarly clear, and could include:
- £x per vacant place, up to a specified maximum. The value is likely to be based on the AWPU for the year groups under consideration.
 - A lump sum payment with clear parameters for calculation, e.g.: estimated cost of providing an appropriate curriculum or estimated salary costs equivalent to the number of staff who would otherwise be made redundant.

Additional points

- 4.8 As with the growth fund, where falling rolls funding is payable to academies, the LA would fund the increase for the period from the additional September intake through until the following August. Any falling rolls funds remaining at the end of the financial year should be reported to Schools Forum. Falling rolls funding carried forward to the following funding period can continue to be used specifically for falling rolls if the authority wishes or returned to headroom.
- 4.9 A number of LAs already have a falling rolls fund in place, including Devon, Dorset, Havering, Hertfordshire and Portsmouth, see Annex C for details of the schemes.

How would a falling rolls fund be funded?

- 4.10 There are no new DSG monies to fund a falling rolls scheme and the introduction of such a scheme would therefore imply a redistribution of existing funding. Under normal circumstances, the falling rolls fund would be funded through the DSG, via a reduction in the delegated funding rates in the schools' funding formula.
- 4.11 It would be too late to introduce this fund in this way for the 2016/17 financial year, because the borough's funding formula needs to be submitted to the EFA by 21st January 2016. For 2016-17, therefore, the options would be to:
- Draw down an amount from the DSG general reserve to supplement the 2016-17 DSG grant allocation. This would necessarily be a one-off allocation and would need to be reviewed each year in light of available resources.
 - Redistribution of other centrally retained DSG budgets, for example by reducing the funding rates used in the growth fund, transferring funding from high needs or early years budget, or reducing other central retained budgets.
- 4.12 For the 2017/18 financial year and beyond, the falling rolls fund, if required, would be paid for by reducing the delegated funding rates in the formula.

Next steps

- 4.13 The Schools Forum is asked to consider whether it wants to see more detailed proposals and, if so, whether there any elements of the existing policies at Devon, Dorset and so on are particularly attractive. If the forum requests a specific proposal, then these will be brought o the March 2016 meeting of the forum.

RBWM GROWTH FUND CRITERIA FOR 2015-16

Agreed Schools Forum 22 October 2014

- 1.1 For 2015-16 financial year RBWM will bring the operation of the schools growth fund closer into line with other authorities. These changes will ensure that expanding schools are fairly funded for additional pupils, but not in a way that ties up funding unnecessarily that could otherwise be available for redistribution to all schools.
- 1.2 Table 1 sets out the revised eligibility criteria for growth funding.

Table 1: Growth fund criteria

| | Eligibility for 2015-16 | Change from 2014-15 | Comments |
|---|---|---|--|
| 1 | A school or academy has agreed with the Borough to provide an extra class in order to meet <u>basic need</u> . This may be either as a temporary increase in pupil numbers, a bulge class or a permanent increase to the school's Planned Admission Number (PAN). | No change | No allocations are made for pupils increases which are not part of formally agreed basic need expansion plans. |
| 2 | Any increase in pupil numbers or extra class must be either at the request of the Lead Member for CS or Cabinet or supported by them. | No change | Schools which increase their numbers without the agreement of RBWM will not normally attract growth funding. |
| 3 | The planned increase in pupil numbers or increase in the PAN must be for at least ten pupils. | New limitation. Previously no minimum number. | Schools should be able to manage increases of fewer than 10 pupils within existing budget. Modelling suggests increases of less than 10 do not result in significant additional costs for schools. |
| 4 | Any permanent increase in a school's planned admission numbers must have been within the last three years. | New limitation | Three years should be sufficient time for the school to adjust to the new arrangements. |
| 5 | Support to cover pre-opening costs / initial equipping allowance for new maintained schools and recoupment academies where the school is opening in response to basic need. | Extension to existing criteria | To recognise start-up costs of new schools. Not yet applicable in RBWM. ³ |
| 6 | Schools in receipt of growth funding which have previously operated mixed age classes or have a PAN in a multiple of 15 would be normally expected to operate some mixed-age classes. Growth funding cannot be used simply to reduce class sizes | No change | Clarification of existing arrangements |

- 1.3 In all other respects, eligibility for growth funding has not changed. For clarification, growth funding will not be allocated where:
- A school has surplus places and then takes additional children up to the PAN.
 - It admits over their PAN at their own choice.
 - It is directed or requested to admit additional pupils as a result of errors, appeals, fair access protocol, SEN or Children in Care etc. as these pupils do not meet the basic need criteria and numbers will normally be low on an individual school basis.

³ Holyport College and Braywick Park are new schools, but they have not specifically been set up to meet basic need. In this case, the EFA funds start-up costs directly.

- It provides an additional infant class to meet infant class size legislation. This is because the funding that was previously held centrally for infant class size was incorporated into the pre-16 funding formula as an uplift to the AWPU rate and delegated to infant schools when the EFA's funding reforms were introduced in April 2013.

1.4 Some schools will continue to face individual and specific circumstances that result in unexpected financial pressures that cannot reasonably be expected to be met from the delegated budget share. Maintained schools can apply for funding from the 'de-delegated' School Contingency Fund to help meet such pressures. These growth fund proposals will not affect the operation of the contingency fund in the future.

2 METHODOLOGY FOR DISTRIBUTING FUNDING

2.1 The methodology for allocating funding from the growth fund was previously based on the planned increase in numbers and the relevant AWPU rate, with no adjustment for actual pupils. This resulted in overfunding in some cases where the planned increase in admissions did not materialise. Our new formula for allocating growth funding from 2015-16 onwards addresses this anomaly by ensuring that funding will be allocated on the actual increase in numbers based on the difference in pupils leaving and joining, for example, in a primary school, the difference between numbers entering Reception in September and the numbers leaving Year 6.

2.2 The rate of funding will also be increased to include a fixed amount of £6,000 per additional class of twenty or over and £4,000 per additional class of 10-19 towards the extra cost of materials and resources. This will be a new allocation from September 2015 in addition to the AWPU funding allocated previously.

2.3 Allocations will therefore be based on the formula:

$((A \times I) + R) \times P$, where

- A = AWPU value for the relevant Key Stage
 I = the increase in actual numbers based on the difference in pupils leaving and joining.
 R = £6,000 towards the cost of materials for increases >19 pupils, £4,000 for increases of between 10 and 19 pupils.
 P = The relevant proportion of the year (usually September to March for maintained schools and September to August for academy schools).

2.4 Funding from the growth fund for bulge classes will be for one year only, as before, but there will be a new limitation that schools with permanent increases will attract growth funding for no more than three consecutive years from the first year of the increase.

2.5 This formula relies on information on actual numbers arriving and leaving the school in August and September. Final payments, which are outside of the school funding formula, will therefore be notified and paid in October, rather than at the start of the financial year.

2.6 Note that it is proposed to hold a growth fund contingency to provide support for schools which meet the above criteria but where agreement to provide an additional class is reached after the budget has been set.

Growth fund indicative allocations 2016-17

| Permanent increases where Sep 15 is within three year limit | Permanent Increase | PAN after increase | Date when increase began | 2014-15 £ | 2015-16 £ | 2016-17 indicative £ |
|---|--------------------|--------------------|--------------------------|---------------|---------------|----------------------|
| Knowl Hill (academy) | + 17 | 30 | Sep-16 | | | 30,893 |
| All Saints Junior | + 23 | 90 | Sep-14 | 37,353 | 42,140 | 42,140 |
| Riverside | + 30 | 60 | Sep-14 | 48,722 | 53,900 | 53,900 |
| Total | | | | 86,075 | 96,040 | 126,933 |

| Bulge class – one year funding only | Bulge class | PAN (not incl bulge class) | Date when increase began | 2014-15 £ | 2015-16 £ | 2016-17 indicative £ |
|---|-------------|----------------------------|--------------------------|----------------|----------------|----------------------|
| 3 x unspecified bulge classes in primary schools in Ascot, Windsor and Maidenhead | + 90 | | Sep-16 | | | 161,700 |
| Contingency | | | | | | 61,367 |
| Datchet* | + 30 | 30 | Sep-14 | 48,722 | 34,801 | |
| Dedworth First | + 30 | 30 | Sep-14 | 48,722 | 50,254 | |
| Homer | + 30 | 45 | Sep-14 | 48,722 | | |
| Lowbrook | + 30 | 30 | Sep-13 | 34,801 | | |
| Holy Trinity Sunningdale | +15 | 30 | Sep-15 | | 27,533 | |
| Total | | | | 180,967 | 112,585 | 223,067 |

| Permanent increases but over three year limit | Permanent Increase | PAN after increase | Date when increase began | 2014-15 allocation £ | 2015-16 indicative allocation £ |
|---|--------------------|--------------------|--------------------------|----------------------|---------------------------------|
| Clewer Green | + 15 | 60 | Sep-13 | 24,361 | 27,533 |
| St Edwards First | + 15 | 90 | Sep-13 | 24,361 | 27,533 |
| St Edwards Middle | + 27 | 120 | Sep-13 | 43,849 | 48,860 |
| Furze Platt Junior | + 15 | 60 | Sep-13 | 24,361 | 27,533 |
| Oldfield | + 30 | 60 | Sep-12 | 48,722 | 53,900 |
| Holyport | + 15 | 60 | Sep-11 | 24,361 | 27,533 |
| Oakfield | + 15 | 60 | Sep-11 | 24,361 | 27,533 |
| St Edmund Champion | + 15 | 60 | Sep-11 | 24,361 | 27,533 |
| Wraysbury | + 15 | 60 | Sep-11 | 24,361 | 27,533 |
| Total | | | | 263,098 | 295,491 |

| Permanent increases is less than threshold | Permanent Increase | PAN after increase | Date when increase began | 2014-15 allocation £ | 2015-16 indicative allocation £ |
|--|--------------------|--------------------|--------------------------|----------------------|---------------------------------|
| Alexander | + 6 | 30 | Sep-13 | 9,744 | 0 |
| Braywood | + 5 | 30 | Sep-14 | 8,120 | 0 |
| Cookham Dean | + 6 | 26 | Sep-12 | 9,744 | 0 |
| Furze Platt Infant | + 9 | 90 | Sep-12 | 14,616 | 0 |
| St Lukes | + 5 | 45 | Sep-11 | 8,120 | 5,800 * |
| St Marys | + 5 | 45 | Sep-10 | 8,120* | 5,800 * |
| White Waltham | + 8 | 30 | Sep-11 | 12,992* | 9,280 * |
| Total | | | | 71,456 | 20,880 |

| | | | | | | |
|--------------------|--|--|--|----------------|----------------|----------------|
| Grand Total | | | | 601,596 | 524,996 | 350,000 |
|--------------------|--|--|--|----------------|----------------|----------------|

* Where relevant, academies also receive 5/12 funding for the period April to August.

Falling rolls criteria

Extract from DfE paper “Schools Revenue Funding 2016-17: Criteria for allocating Falling Rolls Funding”

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/445726/Schools_revenue_funding_2016_to_2017_Criteria_for_allocating_growth_fund_falling_rolls_fund_and_targeted_high_needs_funding1.pdf

52. Local Authorities may topslice the DSG in order to create a small fund to support good schools with falling rolls where local planning data show that the surplus places will be needed in the near future. Criteria for allocating falling rolls funding should contain clear objective trigger points for qualification and a clear formula for calculating allocations. Compliant criteria would generally contain some of the features set out below:

- Support is available only for schools judged Good or Outstanding at their last Ofsted inspection (note that this is a mandatory requirement)
- Surplus capacity exceeds x pupils or x% of the published admission number
- Local planning data shows a requirement for at least x% of the surplus places within the next x years
- Formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort
- The school will need to make redundancies in order to contain spending within its formula budget

53. Methodologies for distributing funding could include:

- £x per vacant place, up to a specified maximum places (place value likely to be based on AWPU)
- a lump sum payment with clear parameters for calculation (e.g. the estimated cost of providing an appropriate curriculum, or estimated salary costs equivalent to the number of staff who would otherwise be made redundant)

54. Some examples of local authorities' compliant criteria are shown below:

Devon

55. The falling rolls criteria in Devon are listed below:

- Schools judged good or outstanding at last Ofsted inspection
- there is a reduction in numbers when comparing the October School census with the previous October census that results in substantial disruption to the provision of education in the school
- admissions demographic data evidences that the reduction is temporary
- the school's roll includes at least 80% of the pupils that live within its area
- the reduction in numbers due to pupil migration to other local schools is not eligible. Schools will be expected to cover the temporary funding shortfall from existing carry forward balances prior to application to the Falling Rolls Fund
- funding will be allocated up to the AWPU rate for the difference between the current year October number on roll and the lower of number on roll at the previous October census and the forecast number on roll using admissions data

Dorset

56. School requesting support to mitigate the short-term financial impact of falling rolls must be graded Outstanding or Good by OFSTED on the date of approval.

57. Falling rolls will only be calculated on the normal year(s) of transfer (YR, Y3, Y5, Y7 and Y9 depending on whether Infant, First, Junior, Primary, Middle, Secondary or Upper School). Schools which normally have more than one age of transfer, due to differences in neighbouring schools transfer age, may have more than one calculation/payment.

58. Surplus capacity in affected year group(s) exceeds 24 pupils or 20% of the number of pupils expected (whichever is the lower), based on the average* of the January census figures for the normal year of transfer for the previous 5 years. (*The average will remove any anomalies such as bulge classes or managed changes in area provision).

59. Local planning data for the pyramid shows a requirement for at least 70% of the surplus places within the following 3 academic years. This is calculated as the 5yr average for the year group less the number on roll for the year group * 70% added to NOR for the year group, must be the predicted NOR for the year group in the school within the next 3 years.

60. It must be demonstrated that formula funding available to the school will not support provision of an appropriate curriculum for the remaining cohort (e.g. evidence will need to be provided to show the impact on meeting basic curriculum requirements or on the pupils being unable to continue part completed examination courses).

61. Any MFG the school receives will be deducted from the grant amount (as with our policy on pupil growth).

62. In the first instance any shortfall in funding due to falling rolls should be made up from any school surplus above 1.7% for a secondary school, 2.7% for a primary or special school or £20,000 whichever is the higher, (as it is anticipated that the school will have been planning for this eventuality) and this will be taken into account when considering an application.

63. Schools will be funded at 100% of AWPU for the agreed number of pupils (through determining the difference between the average from the historic model and the actual level) beyond 24 pupils/20% in the relevant cohort.

64. Funding provided will be a one off payment and not a continuing payment as the cohort moves through the school.

Payment

65. In the academic year when falling rolls occur, the school will receive 7/12ths of funding at the previous census level. The falling rolls payment will therefore be made in the later part of the academic year – the next financial year. (A falling roll intake in 2013 will be a claim in the financial year 2014-2015 and the surplus will be the carry forward into that financial year). Academies will be required to provide the LA with details of their financial position to demonstrate whether or not there is a surplus to take into account.

Having

66. Support is available only for schools judged Good or Outstanding at their last Ofsted inspection (this is a mandatory requirement).

67. Surplus capacity as the October count date exceeds 15% of the published admission number in the following year groups:

Table 2: Surplus capacity support in Havering

| Financial Year | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 |
|----------------|---------|---------|----------|--------------|-----------------|
| Year Group | 7 | 7 & 8 | 7, 8 & 9 | 7, 8, 9 & 10 | 7, 8, 9,10 & 11 |

68. Local planning data shows a requirement for at least 90% of the surplus places within the next 5 years.

69. Formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort.

70. The school will need to make redundancies in order to contain spending within its formula budget.

71. Formula for distributing funding:

- 85% of the appropriate AWPU x per vacant place below 85% of the PAN. e.g.
- First Year of Funding - PAN: 192; 85%: 163
- Year 7 NOR October 2013: 70
- Difference between 85% of PAN and Yr7 NOR: 93
- $93 \times \text{KS3 AWPU} \times 85\%$ ($\pounds 4,551.86 \times 85\% = \pounds 3,869$) = $\pounds 359,824$
- Second Year of Funding - PAN: 192; 85%: 163
- Year 7 NOR October 2014: 120
- Year 8 NOR October 2014: 70
- Difference between 85% of PAN and Yr7 NOR: 72
- Difference between 85% of PAN and Yr8 NOR: 93
- Total difference = 165
- $165 \times \text{KS3 AWPU} \times 85\%$ ($\pounds 4,551.86 \times 85\% = \pounds 3,869$) = $\pounds 638,398$

Hertfordshire

72. The Fund has the following eligibility criteria:

- The school/academy has fewer than 550 pupils (excluding sixth form) in the October census prior to the start of the financial year
- The number of places offered by the school across year groups 7 to 11, if full, is greater than 550
- The authority has forecast that at least 110 places will be required from the school in year 7 (year 9 for upper schools) by Autumn Term 2017, otherwise there will be an absolute shortfall of capacity in the relevant planning area
- The school is Good or Outstanding. The date at which Ofsted category data will be taken will be 31 August prior to the start of the financial year to which funding relates, except that a school which becomes Good or Outstanding during the subsequent Autumn term prior to the start of the financial year shall also be eligible

73. The allocation formula takes account of the size of the school but also incorporates a ceiling on allocations. It also takes into account any MFG protection funding the school receives in its budget share to avoid duplicating it.

74. The formula for determining an allocation to an eligible school is:

- KS3 calculation: $330 - \text{actual number of KS3 pupils on roll} \times \text{KS3 AWPU} \times 50\%$
- KS4 calculation: $220 - \text{actual number of KS4 pupils on roll} \times \text{KS4 AWPU} \times 50\%$
- sum of the result of above capped at $\pounds 250,000$
- deduct any MFG protection funded received by the school
- equals the allocation from the Fund

Portsmouth

75. The fund is only available to Primary and Secondary maintained schools or Academies in Portsmouth.

76. Financial support will only be available for schools:

- Judged Good or Outstanding at their last Ofsted inspection
- The school or academy has seen a reduction in pupils between the October 2012 census and the October 2013 census of 30 or more pupils or has surplus capacity 20% of the published admission number
- Local planning data shows a requirement for at least 50% of the surplus places within the next 3 financial years
-
- Formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort
- The school will need to make redundancies in order to contain spending within its formula budget
- Where the school does not have a surplus revenue balance as at the 31st March 2014 in excess of 5%(secondary) or 8% (primary) of its school budget share for the previous funding period (or the relevant academic years in the case of academies)

77. Schools and academies who believe they meet the above criteria in 2014-15 must submit a request for financial support to the Finance Manager for Education and Children's Services by 15 April 2014.

78. Funding will be issued using the following formula:

- The decrease in the number on roll between October 2013 and October 2014 census
- Multiplied by the value of the 2014 to 2015 basic per pupil entitlement factor
- For secondary schools the basic per pupil entitlement factor for key stage 3 will be used.

79. The maximum allocation to a school or academy from the fund will be limited to £300,000.