

Meeting **Leicestershire Schools' Forum**
Date/Time **Wednesday, 18 September 2013 at 2.30 pm**
Location **Beaumanor Hall, Beaumanor Drive, Woodhouse, Leicestershire**
Officer to contact **Karen Brown / Bryn Emerson (Tel. 0116 3056432)**

AGENDA

<u>Item</u>	<u>Report by</u>	<u>Marked</u>
1. Apologies for absence/Substitutions.		
2. Schools Forum Membership Group 2013-14		2
3. Minutes of the Meeting held on 20th June 2013 (previously circulated) and matters arising.		3
4. 2012/13 School Balances		4
5. School Funding Formula 2014/15 and Funding Age Range Changes		5
6. Draft Work Programme		6
7. Any other business.		
8. Dates of Future Meetings		

Next Meetings (to be agreed):
Tuesday 26 November 2013
Thursday 13 February 2014
Monday 16 June 2014
Thursday 18 September 2014

All the above from 2.00 – 4.00pm.

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SCHOOLS FORUM 2013-14

Membership Group	Revised Membership	Members
<u>Elected Schools Members (including academies)</u>		
Maintained School Governors - Primary	2	David Thomas Tony Gelsthorpe
Maintained School Headteachers - Primary	4	Heather Sewell David Lloyd Karen Allen
Academy Headteachers or Governors - Primary	4	Jean Lewis Julie Kennedy Kirk Hayles Kathryn McGovern
Maintained School Headteacher - Secondary	}	John Bassford
Maintained School Governor – Secondary		
Academy Representatives – Secondary	8	Alex Green Brian Myatt Tim Moralee Sonia Singleton Vacancy Vacancy Vacancy Vacancy
Maintained School - Headteacher / Governor - Special	1	Jason Brookes
Academy Representative – Special	1	JoAnne Rees
<u>Appointed Non School Members</u>		
Catholic Diocese	1	Brenda Carson
Church of England Diocese	1	Ian Sharpe

Early Years PVI provider	1	Vacancy
Pupil Referral Unit	1	Tim Moralee
Trade Union	1	Andy Reeve
Post 16 Provider	1	Vacancy
Total	27	

Leicestershire Schools' Forum

Notes of the meeting held on Thursday 20 June 2013

Present**Tim Moralee – in the Chair**

Brian Myatt Alex Green	Secondary Academy Headteachers
	Secondary Academy Governors
Julie Kennedy	Primary Academy Governor
Heather Sewell	Maintained Primary Headteachers
David Thomas Jean Lewis Tony Gelsthorpe	Maintained Primary Governors
John Bassford	Maintained Secondary Governor
JoAnne Rees	Special Governor
Brenda Carson	RC Diocesan
	Special Representative
	Trade Union Representative
In attendance	Councillor Ivan Ould – Lead Member for Children & Young People's Service Lesley Hagger – Interim Director, Children & Young People's Service Jenny Lawrence – CYPS Finance Business Partner Charlie Palmer – Head of Strategy, Education of Vulnerable Groups Keith Howkins – Education Funding Agency Harninder Brench – Education Funding Agency David McVean – Education Funding Agency Bryn Emerson – note taker

1.	Apologies were received from: Sue Horn, David Lloyd, Andy Reeve, Karen Allen and Sonia Singleton.
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2.	<p><u>Minutes & Matters Arising</u></p> <p>The minutes of the meeting held on 21 February 2013 were agreed with the following amendment:</p> <p>Page 1 – Mr Ould’s name was omitted from the attendance list.</p> <p>J Lewis reported that Graham Bett had now retired. J Lawrence stated that he was therefore no longer eligible to sit on Schools’ Forum.</p> <p>The Chair welcomed everyone to the meeting and introductions were made. The Chair also welcomed colleagues from the Education Funding Agency.</p>
3.	<p><u>Update on Behaviour Partnerships</u></p> <p>C Palmer presented this item and gave a brief outline of the paper.</p> <p>One of the main achievements was long term partnerships and working relationships between schools and the LA and achieving better provision for young people. C Palmer credited B Myatt and secondary colleagues for their time and hard work.</p> <p>J Bassford said this was an excellent piece of work and raised a question about index deprivation – what is going to replace it? C Palmer responded that FSM6 (any child that has had free school meals in the last 6 years) would replace it. J Lawrence to ensure data drive this formula is same types of drivers for school formula – pull out some more indicators, something that benchmarks. J Lawrence to use DfE data set for testing some of the deprivation data we have.</p> <p>B Myatt raised concern to suddenly change formula impact significantly on allocation could be quite detrimental. J Lawrence gave assurance that allocations now and basis allocation 2013/14 unchanged, but formula would be updated future period.</p> <p>J Lewis said this was excellent work and asked how far the LA had got to extending behaviour partnerships to primary level. C Palmer responded that primary partnerships do exist but are not as effective, as primary are a much larger group of schools to work with. Also have to work with schools who have now received delegated money what they want to do collectively. This will be a locality driven agenda. LA will certainly support and encourage them. B Myatt reported on the Blaby and Harborough development of vulnerable family forums. Getting pretty instant help – if successful, those children identified much earlier – really joined up thinking for the first time with multi agencies, really rich and working well, evidenced already in the Blaby district. Intervention taking place for the first time with vulnerable families.</p> <p>L Hagger reported on a recent successful event in Blaby bringing together schools in the local area working with and supporting families and early help services within the</p>

	<p>Department rolled out across County. Information to go out to schools before the end of term.</p> <p>The Chair highlighted how many hours Partnership Chairs had put in to make the plans work and incredibly successful.</p>
4.	<p><u>Revised Leicestershire Scheme for Financing Schools</u></p> <p>J Lawrence presented the revised paper for Schools' Forum approval and highlighted 2 local changes:</p> <ol style="list-style-type: none"> 1 The issuing of Notice of Concern – to ensure the Local Authority's financial position is protected given, deficit on sponsored conversion falls back to the Local Authority. 2 Clarity around the treatment of LA loans to schools, as part of the academy conversion process. <p>There were no comments received from schools by the end of the consultation period.</p> <p>H Sewell reported difficulty trying to find out where to send Schools Financial Value Statements and asked if there was a mechanism/link to send these to. J Lawrence acknowledged a number of queries from schools and said in future she would be issuing reminders.</p> <p>D Thomas expressed disappointment to see no comments from schools to the consultation and asked how many comments had been received from people around the table. J Lawrence confirmed the most responses ever had to a change was 4.</p> <p>Maintained schools – talked at length about reclaiming balances for schools – any money claimed back then goes into the general pot for all schools – is there any evidence for academy schools?</p> <p>K Howkins reported that the previously quite tight restrictions had recently been lifted.</p> <p>D Thomas asked - do we need a restriction on maintained schools?</p> <p>J Lawrence stated that the scheme to control balances was no longer a mandatory requirement. Last time scheme agreed at that time mechanism to control balances. Level of balances schools hold are not triggering by these thresholds.</p> <p>The Chair asked the Forum to vote on the proposal to remove any restrictions on school balances (maintained schools only) – 4 voted for, 0 opposed and 0 abstentions.</p> <p>Agreed - J Lawrence to amend the document and re-circulate to Schools' Forum</p>

	<p>members. With that amendment vote in favour of approving the scheme - 8 in favour, 0 against, 0 abstentions.</p>
5.	<p><u>Schools' Forum Membership – September 2013</u></p> <p>J Lawrence referred to an error in the paper, paragraph 10, first column – the current membership should read - 3 maintained governors and 4 maintained headteachers.</p> <p>Academy schools to inform the LA how they wish to be represented on Schools' Forum. J Lawrence said it was not the LA role to specify to academies whether members should be headteachers or governors, academies to make that decision themselves.</p> <p>D Thomas said it would be useful to have list of who each side, able to represent academies and asked if there was any flexibility on 12 July deadline? D Thomas also asked who the academy members were as referred to in point 3.</p> <p>J Lawrence confirmed the LA would be using information held by the Governor Development Service, although she was aware not 100% coverage of academies. There would be some flexibility, although the LA would like to complete asap, and would therefore be asking academies for a response by 12 July deadline in order to get the process underway to hold elections in September and ensure implementation of the new Schools' Forum membership.</p> <p>D Thomas asked - is there another representative body going to be involved?</p> <p>T Moralee – no – nearly all secondary. Meeting tomorrow with headteachers of academies and happy to collate as Chair of LSH.</p> <p>H Sewell raised concern that LPH had already met. J Kennedy asked whether there was a mechanism at County Hall, whereby all groups/schools could be contacted, a direct route to deal with the timeline?</p> <p>J Lawrence responded this would be possible through the Governor Development Service, although the LA had not got details all academies.</p> <p>D McVean said that any gaps in academy contact details the EFA would be more than happy to provide.</p> <p>Schools' Forum noted the revised membership numbers and were asked to note the election process for academy headteachers and governors to form.</p>
6.	<p><u>2012/13 Schools Budget Outturn</u></p> <p>J Lawrence talked through each section of the paper reporting the final outturn position on schools budget for 2012/13.</p>

	<p>DSG underspend of £4.072M.</p> <p>Questions raised: B Myatt referred to £2M SEN saving – medium to long term provision for children, limited spaces, and asked what C Palmer’s thought where? Places fill up very quickly, plan b, how will that impact on long term provision?</p> <p>C Palmer responded that these savings were due to better local provision and referred to The Braunstone facility – young people educated locally, previously out county places, suiting them better and costing the LA less.</p> <p>Mr Ould reported on the development of the Braunstone project – Bungalow 66 and said it had been a real privilege to open this unit. By developing this provision had cut the average cost from £75,000 to £35,000, but has to be need appropriate. Mr Ould reported there was already discussion taking place regarding a number of children in our schools with mental health problems. School budget provide for that. Supporting Families agenda £1.5M into the pot.</p> <p>L Hagger referred to the Invest to Save approach and said the future was in developing in-house provision in Leicestershire. C Palmer agreed to prepare a paper on the potential for Invest to Save for a future meeting.</p> <p>Schools’ Forum agreed the proposal for the LA not to allocate 2013/14 budget but to move forward into 2014/15. Proposal to set aside £200,000 to support behaviour partnerships – to have conversations with partnership what most appropriate allocation of that funding, so that partnership ready and able to delegate from September.</p> <p>Issues to consider: How best to use unallocated DSG balance of almost £1.9M.</p> <p>Still have some risks within the budget:</p> <ul style="list-style-type: none"> • Residual costs of Hospital School provision now resolved. • Non maintained special schools considering large fee increases had now been resolved and do not anticipate that to happen. <p>Academy conversion underspend retained and used to contribute to 2014/15 budget.</p> <p>The Chair asked the Forum to:</p> <ol style="list-style-type: none"> 1 Note the outcome of figures. 2 Note the DSG reserve and proposals in the paper.
7.	<p><u>School Funding Arrangements 2014/15</u></p> <p>J Lawrence presented a report outlining the DFE’s proposals for 2014/15 and what that means for Leicestershire Formula. The outcome of the Spending Review next</p>

week.

A number of things moving forward in 2014/15.

- Already committed to reviewing the formula.
- Deprivation – need to do some modelling to look whether changes are necessary.
- £150,000 lump sum for all schools.
- Sparsity – need to test out from modelling, how it works.
- Rent – limited to 5% of schools. Impact for some of those schools could be significant.

Will need to come back to Schools' Forum to reaffirm decisions in 2013/14 process to be set again for 2014/15. Likely to reconfigure the working group in developing the formula for 2014/15.

Prior Attainment

A Green raised a question - level 5 KS1 and 2 – will be removed, therefore need to consider a different factor. Will there be full representation on that group?
J Lawrence confirmed there would be.

Mr Ould asked for clarification regarding pupils with prior attainment – position of young people who come into the County on a daily basis, and only reflected when we send return in.

J Lawrence responded - taken at one point during academic year, one-off measurement any particular moment in time. Those important pupils will be picked up.

H Sewell – prior attainment – might find also of change for stage 1. First year, new system. Bar has changed from previous years.

K Howkins – yes could be a change in this year's cohort, added on to existing, quarter of the effect, looking at all pupils in the school, this year's cohort being measured at the moment. That will be tagged on to existing cohort under the existing cohort.

D Thomas – new factor for sparsity – old school protection – significant impact. Have we got larger primary schools represented? Would be happy to represent if a shortage. J Lawrence said there was a number of issues to be considered. Sparsity factor, £100,000 or tapered, now have data, never intended to replace what used to have with previous small school factor.

Sparsity factors restricted inside Leicestershire or across the border. J Lawrence advised - starts from pupils nearest to that primary school - doesn't respect County boundaries.

<p>D McVean – the Department isn't struggling to introduce a National Funding formula. Is trying to recognise in rural areas there are some factors that the lump sum can be blunt in helping to solve. Sparsity factor "to give smaller hammer to crack a smaller nut".</p> <p><u>Age range changes</u></p> <p>Recommendation is to go back to effectively the old 5/12 7/12 count for pupils of previous census counts. More meetings planned to work with the EFA. ESG recruitment for academies will be recouped in the same way as we recalculate it – issue now resolved.</p> <p>Consultation – change affects schools 2014/15 – need to be aware of it happening. May be difficult to manage locally. J Lawrence will update on progress.</p> <p>T Gelsthorpe asked any indication from this year's admission likely patterns parental choice and pupil movement? Looked and identified some trends, initial modelling done is not cost neutral. Have to have individual conversations with all schools affected by this. Need some validation process, can't have inflated numbers in there.</p> <p>K Howkins – application to put in request for transitional arrangements and or some provision to correct estimates if differ, funding still needs to reflect actual numbers, still want to stick with using numbers.</p> <p>A Green – understands Leicestershire situation specific - 3 tier systems rather than 2 tier, around 10+. Could reduce by quarter – any phased working that can be done for schools. Decreasing budget is unmanageable. If EFA, LA and schools consider some sort of strategic support – great benefit. K Howkins – still got to be funded from your pot, but may be contingency available within DSG. There are these sorts of changes in other parts of the country. Needs strategic role around the systems.</p> <p>T Gelsthorpe – 10+ issue. Small 11-16 schools issue around curriculum KS4 extremely expensive, has to be thought about.</p> <p>D Thomas – if school expanding itself, it's a business risk. Is this going to be ring fenced into areas or are all Leicestershire schools affected as it's funded through DSG?</p> <p>T Moralee – children going to be in different locations, might be significant moving to one school – manageability.</p> <p>Mr Ould, Chair of National Employers Union – governors fed up one year financial rewards to school (para 25) – another school attracting staff with no money. Financial viability of schools. Will have to work together to determine how to take this forward. If school can't retain it's pupil distinguished eventually. LA have to find from corporate centre any cost of redundancies from remaining schools. Schools'</p>

<p>Forum going to have to look at this very carefully.</p> <p>B Carson – Diocese – 2 year process for schools – 11-14 and 11-16 age range, conversation about age range widespread amongst groups of schools in local area be shared.</p> <p>J Bassford - not my experience.</p> <p>Consistent education provision across the county.</p> <p>J Bassford – problem faced with Loughborough – concern a lot of short term thinking going on in institutions, potentially smoking ruins not fit to be educating children. Not possible to run this system without strategic overview.</p> <p>Down to provision for children in Leicestershire.</p> <p>A Green – question – money should follow the child assailable. Q – do we have to follow EFA requirements as stated in presentation today? J Lawrence – operational guidance is clear where age range changes expectation LAs will use pupil numbers to reflect that change.</p> <p>A Green - any opportunity – Forum.</p> <p>D McVean – we haven’t got money to fund the same pupil twice. If that child is in maintained or academy – dept has funded that child somewhere. If creating some ability to form partnerships that’s our decision but no pot of money, happy to commit to work. We are all tied by uncertainty of funding, informed intuitive planning. Very limited mechanism in EFA, sudden spurge, to fund some money, but utterly exception. Yes tough but can be planned.</p> <p>A Green – anything we can do within the school in locality to support schools that might help schools though the transition?</p> <p>K Howkins – as part of any application where schools losing pupils, take account of funding falling rolls to support them through transition.</p> <p>J Lawrence - £1.9M may give some capacity to deal with that, to find a local solution to this.</p> <p>B Carson – principal upper school pushing for adjusting and making plans for staffing – do we have a date yet, looking forward 2014/15 – schools having a reduction would like to know sooner rather than later.</p> <p>Third point (page 77) - want to look at local solution to minimise impact of age range change, recognising pot of money within Leicestershire to do it. Also need to know contingency, may be some small adjustments. We note the requirements and will</p>
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	<p>work on LA solutions.</p> <p>B Myatt - some partnerships people working together and have a solution already. Some thinking going on in certain areas.</p> <p>J Lewis – like to look at the very bottom end of numbers – PRU partnership workings – information about numbers coming in at 4+ great variations in places needed throughout Leicestershire. Better information about children entering.</p> <p>The Chair – accept 3 recommendations as they stand. The Forum noted the recommendations, 0 opposed. Point 4 – Forum will be undertaking to</p> <ol style="list-style-type: none"> 1. Recognise the thinking to minimise the impact of significant changes. 2. Create proposal to manage age range changes and impact across the County. 3. Look at the capacity to predict numbers at all levels in schools and impact that has on planning.
8.	<p><u>Any other business</u></p> <p>The Chair thanked colleagues from the EFA for their input. Really helpful to move the meeting along and offer of colleagues to work with.</p> <p>K Howkins gave thanks to J Lawrence in appreciation of paper very clear in stating that the tables identifying who the issues affected and what actions were needed by who is setting best practice.</p>
9.	<p><u>Date of next meeting</u></p> <p>Monday 8 July at 2.30pm at Beaumanor Hall – an informal open discussion on age range changes – to bring back information what happening in groups.</p> <p>Wednesday 18 September at 2.00pm at Beaumanor Hall.</p>

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SCHOOLS FORUM

2012/13 School Balances

18 September 2013

Content Applicable to;		School Phase;	
Maintained Primary and Secondary Schools	X	Pre School	
Academies		Foundation Stage	X
PVI Settings		Primary	X
Special Schools / Academies	X	Secondary	X
Local Authority	X	Post 16	
		High Needs	

Purpose of Report

Content Requires;		By;	
Noting	X	Maintained Primary School Members	X
Decision		Maintained Secondary School Members	X
		Maintained Special School Members	X
		Academy Members	
		All Schools Forum	
<p>‘X’ denotes what actions are required and the groups of members that are able enact the recommendations within the report.</p> <p>Where information is targeted at a particular group of Schools Forum it does not preclude other members from participating in debate.</p>			

1. This report sets out the position in regard to school balances for all schools that were maintained by the local authority on March 31 2013 and the 2012/13 financial year.

Recommendation

2. That Schools Forum note the position on the 2012/13 school balances for local authority maintained schools.

Introduction

3. This report presents the annual position on school balances, it provides that information at individual school level.

Background

4. School balances are only able to be formally measured by the local authority at the closure of the financial year. Balances are not calculated by the local authority but taken from the Consistent Financial Reporting return submitted by individual schools to the local authority.
5. Reporting locally is the first stage of publication of school balance information. Once all school returns are consolidated that information is submitted to the Department for Education (DfE) who subsequently publish that information on a national basis at both local authority and individual school level.
6. Whilst this report presents the position for maintained schools, information on the financial position of academies is not published in the same manner. The DfE recently published the statutory financial statements for academies for the 2011/12 academic year, the information is difficult to locate and is not brought together in a manner in which it would be possible to ascertain the overall financial performance of academies in a particular location.
7. Whilst Schools Forum agreed at its meeting on June 20 2013 to remove the mechanism for controlling school revenue balances, national controls remain on Devolved Formula Capital (DFC) which remains limited to use over three years.

2012/13 School Balances

8. The analysis of school balances is shown in Appendix 1. The figures include all schools that were local authority maintained schools for the full financial year i.e. between April 1 2012 and March 31st 2013. Schools who converted to Academy status on April 1st are shown as those balances remain with the local authority until conversion and will be within the nationally reported school balances. Schools that have converted to academies up between April and July are denoted on the report.
9. Given the exclusion of balances for concerted academies during 2012/13 the 2011/12 balances reported here will not match those reported at the end of 2011/12 but the comparison between years is valid as it includes all schools maintained for the full financial year.
10. The total level of all school balances at 31st March 2013 was £8.3m which is a decrease of £9.7m (53%) from the comparative 2011/12 position. It is unclear why there is such a significant reduction but the values will have been affected by academies that converted with surpluses which are no longer held by Leicestershire. This is in some way validated by the analysis of overall deficits which has remained relatively stable at £2.237m (2011/12 £2.886m) against the position on surpluses at £8.809m (£16.771m 2011/12). In 2011/12 9% of schools were in deficit which accounted for 17% of overall school balances, in 2012/13 8% of school were in deficit accounting for 25% of school balances.

11. A deficit on overall secondary school balances exists for the first time. This is being supported financially by the surplus on primary and special schools, the local authority cannot be in the position of an overall deficit.
12. In terms of individual deficits the analysis shows that;

	Primary	Secondary	Special
Schools in deficit 2011/12 and recording a reduced deficit for 2012/13	6	3	0
Schools in deficit 2011/12 and recording an increased deficit for 2012/13	0	1	0
Schools in surplus 2011/12 and recording a deficit in 2012/13	2	1	1

The focus for the school finance team for 2012/13 is on those schools moving to deficit for the first time and with increasing deficits over the 2011/12 position.

13. Overall 76% of primary schools have balances over 3%, the position in secondary schools shows 30% in that position;

	Primary	Secondary	Special
Deficit	8 (5%)	4 (40%)	1 (33%)
Surplus 0% - 1%	8 (5%)	2 (2%)	0
Surplus 1% - 3%	24 (14%)	1 (1%)	0
Surplus 3% - 5%	31 (18%)	3 (30%)	0
Surplus 5% - 8%	55 (32%)	0	0
Surplus 8% +	44 (26%)	0	2 (67%)
Total	170	10	3

14. Care needs to be taken when analysing school balances as they show a position at a single point in time. Whilst it is the responsibility of the governing body to set a school budget, the finance team will continue to analyse the budget intention returns from schools to identify whether any of the schools currently reporting a surplus expect to move to deficit and if necessary that those schools are operating with an agreed deficit recovery plan. As discussed at previous the finance service has limited tools to undertake this type of exercise and is dependent upon schools sharing accurate information. Once this exercise is completed the finance service is totally dependent upon schools to raise concerns over their financial position if unplanned events occur

A further statement will also be issued at the start of the autumn term to serve as a reminder that school budgets will continue on a cash flat basis at best, that this results in a real terms decrease in resources and that it is essential that schools take the necessary actions to reduce expenditure at the earliest point should they identify a potential deficit.

Balance Control Mechanism

15. Schools Forum removed the mechanism for controlling schools balances when approving The Scheme for Financing Schools at its meeting on 20 June 2013. It can be seen however that had this scheme been in place 17 (10%) primary schools would have been subject to clawback to a value of £240,000

Resource Implications

16. Resource implications are included throughout this report.

Equal Opportunity Issues

17. Non arising directly from this report

Background Papers

Schools Forum 20 June 2013 – Scheme for Financing Schools
Schools Forum 7 September 2012 – 2011/12 School Balances

Officer to Contact

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2012/13 School Balances

	School Balance Analysis 2012-13						School Balance Analysis 2011-12									
	B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance	Total Revenue Balance	Surpluses	Deficits	Total Revenue Balance %	B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance
Primary Schools	3										21					
Sherard Primary School & Community Centre		-228,194	0	0	0	-228,194	-228,194	0	-228,194	-20.8%		-294,951	0	0	0	-294,951
Christ Church and St Peter's Church of England Primary School	-168,001	0	6,297	0	14,357	-147,347	-153,644	0	-153,644	-10.5%	-200,212	0	6,297	0	14,357	-179,557
Elizabeth Woodville Primary School	0	-53,359	0	0	0	-53,359	-53,359	0	-53,359	-7.3%	0	-75,934	30,379	0	0	-45,555
Siteby Redlands Community Primary School	0	-45,324	0	0	0	-45,324	-45,324	0	-45,324	-5.0%	0	2,144	0	0	0	2,144
Swannington Church of England Primary School	0	-12,990	5,723	0	0	-7,267	-12,990	0	-12,990	-3.4%	0	-13,190	7,750	0	0	-5,440
Croft Church of England Primary School	1,453	-13,733	21,428	0	-367	8,781	-12,647	0	-12,647	-2.5%	3,050	-18,347	19,554	0	-194	4,064
Swithland St Leonard's Church of England Primary School	0	-8,467	27,059	0	0	18,592	-8,467	0	-8,467	-2.0%	0	21,724	66,264	0	0	87,988
Richmond Primary School	-25,945	0	6,080	771	0	-19,094	-25,945	0	-25,945	-1.9%	-30,102	0	4,230	940	0	-24,932
Waltham on the Wolds Church of England Primary School	0	-1,321	0	0	7,725	6,404	6,404	6,404	0	-0.3%	0	2,384	0	0	6,375	8,759
Albert Village Community Primary School	0	913	5,431	0	0	6,344	913	913	0	0.1%	13,980	1,402	6,557	0	0	21,939
Belvoirdale Community Primary School	0	2,662	4,319	5,851	0	12,832	2,662	2,662	0	0.2%	0	85,099	4,319	0	0	89,418
Greenfield Primary School	0	3,903	133	0	0	4,037	3,903	3,903	0	0.3%	0	33,485	10,767	0	0	44,252
Saint Peter's Catholic Primary School, Hinckley	0	3,720	0	0	0	3,720	3,720	3,720	0	0.5%	0	33,889	0	0	0	33,889
All Saints Church of England Primary School, Coalville	0	4,680	20,021	0	0	24,701	4,680	4,680	0	0.8%	0	-40,109	48,477	0	0	8,368
Croxton Kerrial Church of England Primary School	0	3,191	4,247	0	0	7,438	3,191	3,191	0	0.8%	0	2,343	6,941	0	0	9,284
Ibstock Junior School and Special Unit	0	6,697	0	0	0	6,697	6,697	6,697	0	0.9%	0	2,464	0	0	0	2,464
Sharnford Church of England Primary School	0	2,989	1,768	-1,768	0	2,989	2,989	2,989	0	0.9%	0	23,581	1,768	-1,768	0	23,581
Kegworth Primary School	0	5,475	0	3,605	0	9,080	5,475	5,475	0	1.0%	0	-7,780	0	5	0	-7,775
Highgate Community Primary School	0	7,725	0	0	0	7,725	7,725	7,725	0	1.1%	0	24,372	4,523	-1	0	28,895
Little Bowden School	0	13,182	8,031	-1,105	0	20,108	13,182	13,182	0	1.1%	24,870	22,059	36,301	0	0	83,230
Market Harborough Church of England Primary School	8,797	6,322	10,372	7,359	0	32,849	15,118	15,118	0	1.2%	9,736	47,123	7,390	7,359	0	71,607
Claybrooke Primary School	0	5,053	0	0	0	5,053	5,053	5,053	0	1.2%	0	14,653	0	0	0	14,653
Gilmorton Chandler Church of England Primary School	0	11,168	0	0	0	11,168	11,168	11,168	0	1.3%	0	68,958	0	0	0	68,958
St Peter's Church of England Primary School, Wymondham	0	4,691	0	0	0	4,691	4,691	4,691	0	1.5%	0	5,998	0	0	0	5,998
Houghton on the Hill Church of England Primary School	10,634	0	8,785	0	0	19,419	10,634	10,634	0	1.6%	28,443	0	3,852	1	0	32,296
Burton on the Wolds Primary School	0	10,596	5,012	3,123	0	18,731	10,596	10,596	0	1.7%	0	16,156	5,012	0	0	21,168
Great Glen St Cuthbert's Church of England Primary School	0	13,066	6	0	0	13,066	13,066	13,066	0	1.8%	546	1,022	6,007	-6,007	-120	1,448
Martinshaw Primary School, Groby	0	13,577	0	0	0	13,577	13,577	13,577	0	1.8%	10,258	35,577	16,198	0	0	62,032
Ravenhurst Primary School	0	41,266	0	0	0	41,266	41,266	41,266	0	2.0%	0	94,785	8,108	0	0	102,893
All Saints Church of England Primary School, Sapcote	0	12,098	0	91	0	12,188	12,098	12,098	0	2.0%	0	23,487	0	91	0	23,578
Mercentfield Primary School	0	21,392	3,835	0	0	25,227	21,392	21,392	0	2.2%	0	30,575	0	0	0	30,575
Long Whalton Church of England Primary School	0	7,709	7,428	0	0	15,137	7,709	7,709	0	2.4%	0	4,431	4,690	0	0	9,121
Foxton Primary School	0	10,893	8,130	0	0	19,023	10,893	10,893	0	2.4%	0	29,659	7,044	0	0	36,703
Brooks Hill Primary School	27,682	52	0	-52	0	27,682	27,734	27,734	0	2.5%	0	52,125	0	0	0	52,125
Old Dalby Church of England Primary School	0	13,188	20,620	0	0	33,808	13,188	13,188	0	2.7%	0	21,064	16,130	0	0	37,194
St Denys Church of England Infant School, Ibstock	0	21,674	21,607	31,838	0	75,119	21,674	21,674	0	2.7%	0	46,516	28,418	0	0	74,935
Blaby Thistly Meadow Primary School	0	22,619	0	0	0	22,619	22,619	22,619	0	2.7%	0	10,888	-26	0	0	10,861
Little Hill Primary School	0	34,387	0	0	0	34,387	34,387	34,387	0	2.8%	0	80,740	14,651	0	0	95,391
Swinford Church of England Primary School	0	10,898	0	0	0	10,898	10,898	10,898	0	2.8%	0	-32,686	6,917	0	0	-25,769
Kirby Muxloe Primary School	0	37,919	11,251	0	0	49,169	37,919	37,919	0	2.8%	0	20,667	2,931	0	0	23,597
Woolden Hill Community Primary School	0	19,248	3,198	0	0	22,446	19,248	19,248	0	2.9%	0	57,143	1,866	173	-831	58,352
Old Mill Primary School, Broughton Astley	1,362	40,586	7,545	0	0	49,493	41,948	41,948	0	3.2%	15,112	65,650	3,399	0	0	84,162
Sherrier Church of England Primary School	0	45,240	0	0	0	45,240	45,240	45,240	0	3.4%	0	85,005	1,829	0	0	86,834
Lubenham, All Saints Church of England Primary School	3,972	9,364	8,795	3,934	0	26,065	13,336	13,336	0	3.6%	1,780	14,622	8,507	8,099	0	33,008
The Grove Primary School	0	40,033	2,040	-1,646	7,908	48,335	47,941	47,941	0	3.6%	0	17,200	2,040	0	1,432	20,672
Richard Hill Church of England Primary School	0	21,183	0	0	0	21,183	21,183	21,183	0	3.7%	0	5,216	666	0	0	5,883
Buckminster Primary School	0	15,348	7,984	0	0	23,332	15,348	15,348	0	3.7%	0	16,882	8,626	0	0	25,508
Hathern Church of England Primary School	2,450	18,232	2,239	0	0	22,921	20,682	20,682	0	3.7%	11,716	17,279	1,697	0	0	30,692
Riverside Community Primary School	42,633	12,855	2,407	9,122	0	67,017	55,488	55,488	0	3.7%	45,219	13,599	-300	5,687	0	64,205
Barrow Hall Orchard Church of England Primary School	0	55,054	17,078	0	0	72,133	55,054	55,054	0	3.8%	0	60,926	19,428	0	-9,563	70,792
South Kilworth Church of England Primary School	1,306	13,586	5,508	46,391	0	66,790	14,892	14,892	0	3.9%	2,496	22,219	25,893	46,391	0	96,999
St Bartholomew's Church of England Primary School	3,263	43,261	878	0	0	47,402	46,524	46,524	0	3.9%	13,425	24,467	14,942	0	0	52,834
Packington Church of England Primary School	0	17,861	5,016	0	0	22,877	17,861	17,861	0	4.0%	0	44,861	7,566	0	0	52,427
Whitwick, St John The Baptist Church of England Primary School	23,385	28,480	6,399	0	0	58,264	51,865	51,865	0	4.1%	32,514	52,137	7,412	0	0	92,063
Orchard Church of England Primary School, Broughton Astley	2,784	26,965	9,889	0	0	39,638	29,749	29,749	0	4.1%	6,187	30,082	20,222	0	0	56,490
Fleckney Church of England Primary School	0	51,154	0	0	0	51,154	51,154	51,154	0	4.2%	79,800	45,739	0	27,522	0	153,061
St Andrew's Church of England Primary School, North Kilworth	0	17,594	0	0	0	17,594	17,594	17,594	0	4.2%	10,832	-27,863	0	0	28,283	11,232
Booth Wood Primary School	0	37,057	0	0	0	37,057	37,057	37,057	0	4.2%	3,123	65,978	0	0	0	69,101
Sir John Moore Church of England Primary School	0	26,330	0	0	0	26,330	26,330	26,330	0	4.2%	0	26,230	0	0	0	26,230
Water Leys Primary School	0	55,541	11,442	0	0	66,982	55,541	55,541	0	4.2%	0	114,582	4,738	0	0	119,320
John Wycliffe Primary School	0	42,119	1,403	-1	0	43,521	42,119	42,119	0	4.3%	0	85,737	11,966	0	0	97,703
Harby Church of England Primary School	0	17,635	9,405	0	0	27,041	17,635	17,635	0	4.4%	0	33,827	42,623	0	0	76,449
Warren Hills Community Primary School	0	49,457	19,380	0	0	68,837	49,457	49,457	0	4.4%	0	58,894	23,497	0	0	82,390

	School Balance Analysis 2012-13						Total Revenue Balance	Surpluses	Deficits	Total Revenue Balance %	School Balance Analysis 2011-12					
	B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance					B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance
Barlestone Church of England Primary School	5,708	20,470	19,061	0	0	45,239	26,178	26,178	0	4.4%	0	35,788	19,061	0	0	54,849
Woodcote Primary School	0	38,155	1	0	0	38,156	38,155	38,155	0	4.5%	1,969	37,052	1	0	0	39,022
Stanton under Bardon Community Primary School	0	16,444	15,326	0	0	31,770	16,444	16,444	0	4.5%	0	20,818	11,592	0	0	32,410
Cossington Church of England Primary School	0	20,095	16,954	0	0	37,049	20,095	20,095	0	4.5%	0	33,806	24,875	0	0	58,681
Blackfordby, St Margaret's Church of England Primary School	3,679	13,739	0	0	0	17,418	17,418	17,418	0	4.5%	11,992	4,358	0	0	0	16,350
St Margaret's Church of England Primary School	0	31,687	0	0	0	31,687	31,687	31,687	0	4.5%	0	53,673	0	0	0	53,673
Holliers Walk Primary School	0	63,853	24,664	0	0	88,517	63,853	63,853	0	4.6%	0	96,945	15,973	8,691	0	121,609
Bringhurst Primary School	0	26,186	3,238	-2,017	0	27,407	26,186	26,186	0	4.7%	0	14,863	3,238	0	0	18,101
Congerstone Primary School	0	29,112	11,111	0	0	40,223	29,112	29,112	0	4.8%	0	20,928	5,446	0	0	26,374
Belton Church of England Primary School	0	19,700	1,144	0	0	20,844	19,700	19,700	0	5.0%	0	15,918	0	0	0	15,918
Ab Kettleby Community Primary School	0	14,945	0	0	0	14,945	14,945	14,945	0	5.0%	0	21,718	54,893	0	0	76,612
Hallbrook Primary School, Broughton Astley	0	44,361	38,639	0	0	83,000	44,361	44,361	0	5.0%	9,926	25,833	48,820	0	0	84,579
Witherley Church of England Primary School	0	22,377	4,482	0	0	26,859	22,377	22,377	0	5.1%	176	34,153	2,966	-275	0	37,020
Brownlow School	36,734	59,073	0	0	0	95,807	95,807	95,807	0	5.1%	18,468	81,047	11,066	0	0	110,581
New Swannington Primary School	0	39,924	11,956	0	0	51,880	39,924	39,924	0	5.2%	0	62,168	5,683	0	0	67,851
Wymeswold Church of England Primary School	0	23,749	44,717	0	0	68,466	23,749	23,749	0	5.3%	0	32,354	39,478	0	0	71,832
Saint Charles's Catholic Primary School, Measham	0	27,712	0	0	0	27,712	27,712	27,712	0	5.3%	0	34,712	0	0	0	34,712
St Peter's Church of England Primary School	0	49,749	0	0	0	49,749	49,749	49,749	0	5.4%	4,248	64,001	0	0	0	68,249
Somerby Primary School	0	11,205	7,851	-161	0	18,896	11,205	11,205	0	5.4%	0	16,478	7,851	-1,330	0	22,999
Worthington School	939	17,499	6,065	0	0	24,503	18,438	18,438	0	5.4%	0	4,998	2,154	0	0	7,152
Newcroft Primary School	23,272	31,803	4,507	0	0	59,582	55,075	55,075	0	5.5%	27,374	30,441	35	0	0	57,850
Robert Bakewell Primary School and Community Centre	0	52,185	5,085	0	0	57,270	52,185	52,185	0	5.5%	0	33,593	0	29,771	0	63,364
Bishop Ellis Catholic Primary School, Thurmaston	0	65,265	0	0	0	65,265	65,265	65,265	0	5.6%	0	60,149	0	0	0	60,149
Badgerbrook Primary School	0	76,453	16,245	0	0	92,699	76,453	76,453	0	5.6%	0	85,410	23,899	0	-168	109,141
Thurlaston Church of England Primary School	0	26,443	0	0	0	26,443	26,443	26,443	0	5.7%	0	21,556	0	0	0	21,556
Willesley Primary School	0	65,172	12,000	0	0	77,171	65,172	65,172	0	5.7%	0	82,990	19,543	7,500	0	110,033
Burbage Church of England Infant School	0	56,998	62,555	-54,928	0	64,625	56,998	56,998	0	5.7%	0	94,452	62,555	0	0	157,006
Newton Burgoland Primary School	0	22,172	17,594	0	0	39,767	22,172	22,172	0	5.7%	0	27,839	17,305	0	0	45,144
Fernvale Primary School	0	40,335	9,525	45,995	0	95,855	40,335	40,335	0	6.0%	0	35,195	26,881	45,995	0	108,071
Oakthorpe Primary School	1,656	28,062	1,557	0	0	31,275	29,718	29,718	0	6.1%	2,680	23,108	0	0	0	25,789
Church Langton Church of England Primary School	0	44,782	0	0	0	44,782	44,782	44,782	0	6.1%	0	62,398	0	0	0	62,398
Donisthorpe Primary School	0	54,649	438	0	0	55,087	54,649	54,649	0	6.2%	0	24,484	0	0	0	24,484
Orchard Community Primary School	0	47,622	2,952	0	0	50,575	47,622	47,622	0	6.2%	0	22,357	12,213	0	0	34,570
Asfordby Captains Close Primary School	0	38,950	16,727	0	0	55,676	38,950	38,950	0	6.3%	0	30,431	12,808	0	0	43,239
Saint Francis Catholic Primary School, Melton Mowbray	0	57,780	0	0	0	57,780	57,780	57,780	0	6.4%	5,680	42,688	0	0	0	48,368
Woodland Grange Primary School, Oadby	0	82,219	13,273	1,200	0	96,693	82,219	82,219	0	6.5%	0	107,659	25,436	0	0	133,095
Sheepy Magna Church of England Primary School	0	31,616	5,001	-5,029	0	31,588	31,616	31,616	0	6.5%	2,395	33,489	5,001	0	0	40,885
Breedon on the Hill, St Hardulph's Church of England Primary School	0	21,087	268	0	0	21,355	21,087	21,087	0	6.6%	0	16,569	33,094	0	0	49,664
St Mary's Church of England Primary School, Hinckley	0	69,385	0	0	0	69,385	69,385	69,385	0	6.6%	0	48,331	69	0	0	48,400
Woodhouse Eaves, St Paul's Church of England Primary School	0	48,378	0	0	0	48,378	48,378	48,378	0	6.7%	0	37,144	10,282	0	0	47,426
Manorfield Church of England Primary School	0	80,859	2,210	19,813	0	102,882	80,859	80,859	0	6.7%	0	63,349	4,347	48,845	0	116,541
Newbold Church of England Primary School	0	18,207	12,784	0	0	30,991	18,207	18,207	0	6.7%	0	25,155	11,115	0	0	36,270
Rothley Church of England Primary School	0	73,390	20,425	0	0	93,815	73,390	73,390	0	6.7%	0	55,662	16,724	0	0	72,386
Thumby, St Luke's Church of England Primary School	0	51,313	6,268	0	0	57,581	51,313	51,313	0	6.8%	0	44,645	10,883	0	0	55,528
Townlands Church of England Primary School	0	56,462	3,963	2,663	0	63,088	56,462	56,462	0	6.8%	0	42,019	3,963	0	0	45,982
All Saints Church of England Primary School	0	76,132	0	0	23,886	100,018	100,018	100,018	0	6.9%	11,500	79,640	0	0	22,236	113,375
Thythorn Field Community Primary School	0	44,768	13,282	0	0	58,050	44,768	44,768	0	7.0%	0	53,165	24,261	0	0	77,426
Newbold Verdon Primary School	0	65,593	12,234	-12,234	8,171	73,764	73,764	73,764	0	7.0%	0	48,998	12,234	0	0	61,232
Viscount Beaumont's Church of England Primary School	0	34,026	0	-389	0	33,638	34,026	34,026	0	7.2%	0	42,441	0	0	0	42,441
Frisby Church of England Primary School	0	31,864	5,136	0	0	37,000	31,864	31,864	0	7.3%	0	37,534	0	0	0	37,534
St Botolph's Church of England Primary School	0	60,135	11,800	0	0	71,934	60,135	60,135	0	7.4%	2,873	60,424	5,437	0	0	68,734
Ashby de la Zouch Church of England Primary School	0	78,631	16,787	0	0	95,418	78,631	78,631	0	7.4%	12,240	86,483	16,749	0	0	115,472
Kingsway Primary School	0	92,853	29,789	-27,242	0	95,400	92,853	92,853	0	7.4%	0	111,285	29,789	0	0	141,074
Tugby Church of England Primary School	0	22,635	1,893	0	0	24,527	22,635	22,635	0	7.5%	0	25,518	204	0	0	25,722
Snarestone Church of England Primary School	0	24,192	0	0	0	24,192	24,192	24,192	0	7.5%	0	24,375	0	0	0	24,375
Scafold Church of England Primary School	0	27,438	8,824	0	0	36,262	27,438	27,438	0	7.6%	0	35,631	50,779	0	0	86,410
Griffydham Primary School	0	35,035	0	0	0	35,035	35,035	35,035	0	7.7%	1,000	42,872	2,588	0	0	46,460
Hugglescote Community Primary School	3,169	123,291	12,627	0	0	139,087	126,460	126,460	0	7.7%	17,588	127,075	19,450	0	0	164,113
Desford Community Primary School	0	75,040	0	1,879	-8,043	68,877	66,998	66,998	0	7.8%	20,200	48,231	0	0	0	68,431
Moira Infant School	2,176	31,428	22,901	0	0	56,505	33,604	33,604	0	7.8%	1,512	28,144	34,063	0	0	63,719
Enderby Danemill Primary School	0	117,024	13,746	0	0	130,770	117,024	117,024	0	7.9%	0	139,683	5,066	0	0	144,749
St Edwards Church of England Primary School	40,000	15,745	0	2,377	4,718	62,840	60,463	60,463	0	7.9%	25,975	12,114	0	169	5,657	43,915
Higham on the Hill Church of England Primary School	0	27,594	16,401	0	0	43,994	27,594	27,594	0	7.9%	0	20,171	21,042	0	0	41,213
Kilby St. Mary's Church of England Primary School	0	34,774	0	0	0	34,774	34,774	34,774	0	8.0%	34,000	30,760	0	0	0	64,760
Westfield Infant School, Hinckley	0	96,518	0	0	0	96,518	96,518	96,518	0	8.1%	0	102,577	0	0	0	102,577
Heather Primary School	1,000	40,063	16,707	0	0	57,770	41,063	41,063	0	8.2%	0	49,832	14,309	0	0	64,141
Woodstone Primary School	0	68,913	7,590	0	0	76,503	68,913	68,913	0	8.5%	0	63,144	4,466	0	0	67,610
The Latimer School, Anstey	0	81,823	18,228	0	0	100,051	81,823	81,823	0	8.5%	0	65,109	12,099	0	0	77,208

	School Balance Analysis 2012-13						Total Revenue Balance	Surpluses	Deficits	Total Revenue Balance %	School Balance Analysis 2011-12					
	B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance					B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance
Ellistown Community Primary School	0	75,978	0	0	0	75,978	75,978	75,978	0	8.5%	0	85,887	186	0	0	86,073
St Peter's Church of England Primary School, Whetstone	0	78,422	0	0	-70	78,352	78,352	78,352	0	8.6%	4,000	90,632	0	0	-6	94,626
Husbands Bosworth Church of England Primary School	0	33,925	24,276	0	0	58,201	33,925	33,925	0	8.8%	3,265	30,533	48,117	0	0	81,915
Ullesthorpe Church of England Primary School	0	43,326	55	0	0	43,381	43,326	43,326	0	8.9%	0	12,558	7,034	0	0	19,591
Long Clawson Church of England Primary School	0	43,622	5,046	0	0	48,668	43,622	43,622	0	8.9%	0	37,314	0	0	0	37,314
Hose Church of England Primary School	0	28,418	3,430	4,811	0	36,659	28,418	28,418	0	9.0%	0	31,553	3,430	6,200	0	41,183
Oxley Primary School, Shepshed	0	67,982	5,310	0	0	73,292	67,982	67,982	0	9.3%	8,401	63,502	1,950	0	0	73,852
Glenfield Primary School	0	146,268	38,136	-29,523	0	154,881	146,268	146,268	0	9.3%	0	133,964	38,136	0	0	172,100
Hemington Primary School	0	28,389	96	0	0	28,484	28,389	28,389	0	9.4%	749	7,428	12,970	0	0	21,146
Glenmere Community Primary School	0	58,208	18,230	0	0	76,438	58,208	58,208	0	9.5%	0	58,413	52,380	0	0	110,793
Redmile Church of England Primary School	0	35,117	3,134	0	0	38,251	35,117	35,117	0	9.5%	0	31,311	0	0	0	31,311
Thorpe Acre Junior School	0	65,339	21,649	0	0	86,988	65,339	65,339	0	9.5%	0	48,898	35,216	0	0	84,114
The Hall School	75,000	62,670	17,259	0	0	154,929	137,670	137,670	0	9.5%	0	90,496	8,624	0	0	99,120
Burbage Junior School	0	117,282	20,909	0	0	138,191	117,282	117,282	0	9.6%	0	92,952	12,656	0	0	105,608
Dove Bank Primary School	0	46,364	27,678	-9,226	0	64,816	46,364	46,364	0	9.6%	0	39,581	27,678	0	0	67,259
Arnesby Church of England Primary School	0	28,640	1,756	3,190	0	33,586	28,640	28,640	0	9.6%	0	33,815	7,080	0	0	40,895
Sketchley Hill Primary School	0	134,218	25,684	0	0	159,901	134,218	134,218	0	9.6%	0	137,801	16,959	0	0	154,760
Highcliffe Primary School and Community Centre	0	136,993	18,978	0	0	155,971	136,993	136,993	0	9.7%	0	135,601	31,415	0	0	167,016
Westfield Junior School	0	115,731	2,413	0	-12,077	106,066	103,653	103,653	0	9.8%	4,233	67,745	6,308	0	0	78,286
Diseworth Church of England Primary School	0	27,816	14,637	0	0	42,453	27,816	27,816	0	9.8%	166	20,924	25,292	0	0	46,381
Battling Brook Community Primary School	0	176,294	75,838	-27,135	0	224,997	176,294	176,294	0	9.8%	0	164,341	87,336	-27,135	0	224,542
Billesdon Parochial Primary School	0	37,414	10,341	0	0	47,755	37,414	37,414	0	9.8%	0	13,762	12,414	0	0	26,176
Newtown Linford Primary School	0	31,616	6,358	0	0	37,974	31,616	31,616	0	9.8%	0	26,899	13,716	0	0	40,614
Dunton Bassett Primary School	0	41,990	7,088	0	0	49,078	41,990	41,990	0	10.1%	0	9,997	14,016	2,486	0	26,499
The Pastures Primary School	0	108,287	0	-154	0	108,134	108,287	108,287	0	10.3%	26,217	46,565	20,054	25,958	0	118,794
Hallaton Church of England Primary School	0	44,404	13,657	0	0	58,061	44,404	44,404	0	10.3%	0	31,310	23,280	0	0	54,589
Barwell Infant School	6,562	66,681	0	0	0	73,243	73,243	73,243	0	10.4%	15,557	35,000	0	0	0	50,557
Launde Primary School	0	180,497	40,829	0	168,080	389,406	348,577	348,577	0	10.6%	0	168,615	86,856	0	56,872	312,943
St Mary's Church of England Primary School Bitteswell	33	52,072	0	40,170	0	92,274	52,104	52,104	0	10.7%	9,754	39,116	0	29,100	0	77,969
Greystoke Primary School, Narborough	0	123,911	38,201	1,369	-3,728	159,753	120,183	120,183	0	10.7%	9,010	95,871	82,389	1,369	0	188,639
Blaby Stokes Church of England Primary School	0	131,208	27,241	0	0	158,449	131,208	131,208	0	11.1%	23,196	43,777	19,573	0	0	86,546
Barwell Newlands Community Primary School	10,504	109,521	44,622	-12,340	0	152,307	120,025	120,025	0	11.1%	4,158	49,036	44,622	10,564	0	108,380
Brookside School	0	175,892	27,615	0	0	203,507	175,892	175,892	0	12.2%	0	144,178	30,926	0	0	175,104
Langmoor Primary School, Oadby	13,024	68,049	26,793	0	0	107,866	81,073	81,073	0	12.2%	0	59,602	31,660	0	1,154	92,416
Thorpe Acre Infant School	0	73,903	11,563	-5,593	0	79,873	73,903	73,903	0	12.9%	15,981	40,634	11,563	0	0	68,178
Thornton Community Primary School	22,472	45,027	13,587	0	0	81,086	67,499	67,499	0	13.1%	0	33,096	8,338	0	0	41,435
Seagrave Village Primary School	31,542	28,611	30,079	0	0	90,232	60,153	60,153	0	13.9%	0	44,779	27,883	0	0	72,662
Thringstone Primary School	0	101,396	5,864	0	0	107,260	101,396	101,396	0	14.7%	0	68,165	17,396	0	0	85,562
Slathem Primary School	0	65,004	26,002	0	0	91,007	65,004	65,004	0	16.0%	0	55,745	52,261	5,366	0	113,372
Loughborough Church of England Primary School	0	158,818	0	-19,147	0	139,671	158,818	158,818	0	17.3%	0	87,481	0	0	0	87,481
Primary Total	213,244	7,026,932	1,609,074	25,862	210,561	9,085,673	7,450,737	7,991,306	-540,569	5.3%	939,728	9,564,713	2,698,107	238,350	153,072	13,593,971
Secondary Schools																
William Bradford Community College	0	-665,930	0	0	4,908	-661,022	-661,022	0	-661,022	-22.5%	0	-794,330	0	0	4,908	-789,422
Burleigh Community College	1,043	-714,748	0	0	0	-713,706	-713,706	0	-713,706	-11.0%	0	-462,424	9,328	0	-35,307	-488,403
Hind Leys Community College	0	-161,067	35,337	-29,459	28,926	-126,264	-132,141	0	-132,141	-4.7%	0	-234,475	35,337	0	28,249	-170,889
Hastings High School	0	-75,216	175	893	0	-74,147	-75,216	0	-75,216	-3.1%	0	-230,302	8	24,170	0	-206,123
The Beauchamp College	0	39,875	0	0	0	39,875	39,875	39,875	0	0.3%	-36,634	0	0	0	0	-36,634
Longslade Community College	0	69,718	44,487	0	-73,705	40,500	-3,986	0	-3,986	1.0%	0	140,398	34,860	0	-80,677	94,581
Shepshed High School	0	44,451	32,731	-23,102	0	54,080	44,451	44,451	0	1.6%	33,777	184,952	32,731	-16,443	-172,447	62,670
The Garendon High School	21,149	57,207	11,786	0	0	90,142	78,356	78,356	0	3.8%	0	27,435	18,086	-16,849	0	28,672
The Stonehill High School	0	140,477	1,543	0	-1,114	140,906	139,363	139,363	0	4.3%	0	184,744	0	0	-748	183,996
South Charnwood High School	0	117,942	254	-254	-12,375	105,567	105,567	105,567	0	4.4%	0	119,522	254	14,499	-12,329	121,946
Secondary Total	22,191	-1,147,291	126,312	-51,922	-53,360	-1,104,070	-1,178,460	407,611	-1,586,071	-2.5%	1,134,451	1,702,738	1,124,497	388,454	-478,435	3,871,705
Mainstream Total	235,436	5,879,641	1,735,386	-26,060	157,201	7,981,604	6,272,278	8,398,918	-1,266,640	3.4%	2,074,179	11,267,451	3,822,605	626,804	-325,363	17,465,676
Special Schools																
Birch Wood School	0	-110,789	0	0	0	-110,789	-110,789	0	-110,789	-5.1%	0	9,530	0	0	0	9,530
Ashmount School	0	161,432	0	0	0	161,432	161,432	161,432	0	8.7%	139,968	0	32,308	0	0	172,276
Maplewell Hall School	0	241,783	13,963	0	0	255,746	241,783	241,783	0	9.8%	5,357	190,814	38,084	0	0	234,255
Special Total	0	292,426	13,963	0	0	306,390	292,426	403,215	-110,789	4.5%	145,325	200,344	70,392	0	0	416,061
Nursery Schools																
Countesthorpe Nursery School	379	7,483	25,066	0	0	32,928	7,862	7,862	0	4.8%	0	0	0	0	0	0

21

	School Balance Analysis 2012-13						Total Revenue Balance	Surpluses	Deficits	Total Revenue Balance %	School Balance Analysis 2011-12					
	B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance					B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance
Grand Total	235,815	6,179,550	1,774,416	-26,060	157,201	8,320,922	6,572,566	8,809,994	-2,237,428	3.4%	2,219,504	11,467,795	3,892,997	626,804	-325,363	17,881,737

	School Balance Analysis 2012-13						Total Revenue Balance	Surpluses	Deficits	Total Revenue Balance %	School Balance Analysis 2011-12							
	B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance					B01 Committed Revenue Balance	B02 Uncommitted Revenue Balance	B03 Devolved Capital Balance	B05 Other Capital Balance	B06 Community Focused Extended	Total Balance		
2012/13 Movement in balances	-1,983,689	-5,288,245	-2,118,581	-652,864	482,564	-9,560,815												
Committed + Uncommitted Revenue Balance Analysis:																		
	Deficit		Surplus		Average						Deficit		Surplus		Average			
	No of Schools	Value £	No of Schools	Value £	Deficit £	Surplus £					No of Schools	Value £	No of Schools	Value £	Deficit £	Surplus £		
Primary	8	-540,569	163	7,991,306	-67,571	49,026					13	-766,632	208	11,290,407	-58,972	54,281		
Secondary	5	-1,586,071	5	407,611	-317,214	81,522					9	-2,107,938	32	4,911,705	-234,215	153,491		
Special	1	-110,789	2	403,215	-110,789	201,607					1	-12,244	6	568,937	-12,244	94,823		
Nursery	0	0	1	7,862		7,862												
Total	14	-2,237,428	171	8,809,994							23	-2,886,814	246	16,771,049				
	8%		92%								9%		91%					
Schools converted to academy status up to July 1st 2013																		
Schools with Academy conversion dates - as at 6 July 2013																		

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SCHOOLS FORUM

2014/15 School Funding Formula and Funding Age Range Changes

June 18 2013

Content Applicable to;		School Phase;	
Maintained Primary and Secondary Schools	X	Pre School	
Academies	X	Foundation Stage	X
PVI Settings		Primary	X
Special Schools / Academies		Secondary	X
Local Authority		Post 16	
		High Needs	

Purpose of Report

Content Requires;		By;	
Noting		Maintained Primary School Members	X
Decision	X	Maintained Secondary School Members	X
		Maintained Special School Members	
		Academy Members	X
		All Schools Forum	

1. This report presents the outcomes of the school funding formula working group commissioned by Schools Forum to review the 2013/14 school funding formula and the approach to funding age range changes in academies and maintained schools.

Recommendations

2. That Schools Forum supports the approach to the 2014/15 school funding formula and the recommendation for no change from the approved 2013/14 school funding formula.
3. That Schools Forum supports the local authorities proposal to be submitted to the Education Funding Agency in order to fund maintained schools and academies for the impact of age range changes.

Introduction

4. This information is presented to Schools Forum in its role as a consultative body on all aspects of school funding and reports the outcome of the school funding formula working group commissioned to work alongside the local authority in developing the detail of the proposals.
5. The local authority would like to express its thanks to the formula working group that met on three occasions to consider both potential changes to the formula and funding age range changes (including during the summer break). The group consisted of:

Jane Ripley	Business Manager	Beauchamp College
Beverly Cupplleditch	Business Manager	Kibworth High
Alex Green	Principal	Abington High
Judith Malcolm	Business Manager	Beacon Academy
Cathy Payne	Business Manager	Manor High
Andy Winter	Business Manager	Wreake Valley
Helene Chadwick	Business Manager	Lutterworth High
Dave Green	Business Manager	Woodbrook Vale
Heather Sewell	Headteacher	Cossington Primary
Tina Hudson-Goater	Business Manager	Limehurst Academy
Sue Ward	Headteacher	Newton Burgoland Primay
Jo Turner	Business Manager	Fleckney Primary

Not all members attended all three meetings. It should be noted that the group failed to obtain a consensus view on the proposals for funding age range changes. The local authority is making the proposals having undertaken due process to identify the best possible position for Leicestershire schools within the constraints of the level of funding and the position of the EFA which allows funding to be recouped should it fail to respond to school organisational change.

Background

6. The Department for Education (DfE) issued their analysis in June of school funding formulae implemented by local authorities required under school funding reform, this followed the release of national information on the values and factors used for all local authorities. This information was considered by Schools Forum at its meeting on 20 June 2013. Additionally in recommending the 2013/14 school formula to Cabinet for approval Schools Forum requested a review of the new formula during 2013/14.
7. As a result of age ranges changes in academies the Education Funding Agency (EFA) are requiring Leicestershire to amend the pupil number count used to drive future school budgets to ensure that school reorganisation is adequately funded for both schools growing and decreasing in numbers. It is important to note that this is not a change in the school formula but a request to the Secretary of State for Education submitted under paragraph 25 i) of the School and Early Years Finance

(England) Regulations 2012 to enable the local authority to disregard the October 2013 pupil number count to fund school budgets for 2014/15.

8. Schools Forum re-commissioned the formula working group to consider both the funding formula and the impact of age range changes, this report presents the outcome of that work. The working group were briefed with respect that the task was to work with the authority that would best fit the needs of all schools in Leicestershire rather than view the proposals from the perspective of their individual schools.

2014/15 School Funding Formula

9. The formula working group considered local authority modelling on the new options available within the formula and where the Leicestershire formula was outside the range of that shown by authorities deemed to be Leicestershire's statistical neighbours.
10. The working group supported the view of the local authority that there should be no changes to the formula factors for 2014/15. A number of factors supported the rationale for no change;
 - a) There is no necessity or requirement for Leicestershire to make any formula changes. 2013/14 saw significant and complicated changes and it can be expected that the next phase of the national funding formula will require further change. It was viewed that 2014/15 should be taken as a relatively small period of stability.
 - b) The Leicestershire formula is in line with that of local authority statistical neighbours except for funding through IDACI where the allocation in Leicestershire is low and in the lump sum which is high. The working group considered modelling in a number of areas;
 - a) Moving funding from the lump sum to IDACI
 - b) A reduction in the per pupil entitlement and an increase in IDACI factors
 - c) Introduction of the sparsity factor

These changes would all result in unnecessary turbulence and the group did not request that the local authority do any further modelling on potential changes.

- c) Only 17 primary and 1 secondary school are eligible for the sparsity factor. Within the current formula it was a conscious decision to move to a higher lump sum of £150,000 in order to protect a larger number of schools, this remains within the DfE's acceptable level and should be retained. Modelling identified a significant and un-moderated financial advantage which was not deemed acceptable for these 18 schools from its introduction.
- d) The focus of the local authorities work should be on achieving an acceptable solution for Leicestershire schools affected by age range changes which would have a significant impact in 2014/15 and for any future reorganisations.

Background to Age Range Changes

11. The requirement to reflect age range changes within school funding in 2014/15 remains unchanged from the position reported to Schools Forum on June 20. The EFA are requiring Leicestershire to implement changes to ensure that funding follows the pupil and be received by the school educating that pupil at the time. Forum

determined at the June meeting that it was not appropriate for either the EFA or the local authority to be funding a single pupil in two locations.

12. The EFA are able to act to ensure that funding will follow the pupil through the operational guidance supporting 2014/15 funding changes which makes provision for the EFA to remove Dedicated Schools Grant (DSG) from local authorities where they fail to respond to the movement in pupils in academies. This is in order that they can in turn fully fund academies for the pupils they have on roll in 2014/15. The EFA have provided funding for age range changes in academies in the 2013/14 academic year of c£3m and have been clear that they cannot repeat this funding. Had this funding been able to be removed from the DSG settlement, as per the arrangements for 2014/15, it equates to a reduction in the per pupil entitlement of 1.16% or would restrict the ceiling on schools gaining through the new formula to 0.5%.
13. The EFA have been robustly challenged on the requirement to change but have the ability to enforce a position whereby funding for all schools in Leicestershire can be affected. It is therefore imperative that the local authority is able to implement a model acceptable to both the EFA and to affected schools. In doing this it has to be accepted that the model must be sustainable and delivered in a position of cash neutrality – the local authority is not able to provide additional resources to fund the changes. Schools Forum accepted this position through the statements of intent made at the June meeting and again at the informal meeting on 8 July which are;
 - a) To recognise the thinking to minimise the impact of significant changes.
 - b) To create a proposal to manage age range changes and the impact across the County.
 - c) Look at the capacity to predict numbers at all levels in schools and the impact that has on planning.
14. The authority has worked with both the formula working group and the EFA in the formulation proposals which must be submitted to the EFA by 30 September for formal approval by the Secretary of State. To reiterate, this is not a change to the agreed funding formula but a request to vary the pupil numbers used within the formula together with a request to amend the calculation of the Minimum Funding Guarantee (MFG) to ensure that affected schools do not receive an inappropriate financial benefit from the changes. The latter change is necessary largely as a result of the differential funding rates for KS3 and KS4.
15. It is essential that within the proposals that maintained schools and academies are treated in the same manner. In formulating the proposals the impact of funding school protection is shared across all schools given that this is a whole Leicestershire issue and that at some point most schools are likely in some way to be affected by age range changes.
16. Whilst formal approval by the EFA is required through the submission of a request by 30 September they have indicated that they will allow the local authority to use the initial data on September 2014 secondary school admissions that will be available in November. By using this data the ability for schools to overstate September 2014 pupil numbers is removed. This will not give a comprehensive picture at primary school level, accordingly the local authority will assume, for example, that the current year 5 will be fully retained into year 6 if moving to a 5-11 school.

17. Whilst it is necessary to have a sustainable model given that age range changes are likely to continue into the future it is not possible at this time to determine what, or if, impact future school funding reform will have on the proposals.
18. All modelling has been completed on the data used for the 2013/14 formula, any underlying changes in that data may require adjustments marginally different from any values given in this report, any such changes will be reported to Schools Forum through the budget setting exercise.

Age Range Changes – Funding Proposal

19. The proposal considers three areas for schools affected by age range changes;
 - a) Pupil numbers
 - b) Protection for schools with falling rolls
 - c) Changes to the calculation of the Minimum Funding Guarantee for affected schools.

Affected schools are defined as;

- i) Those schools undertaking an age range change and
- ii) Schools that have historical feeder links to an age range change school where the number on roll will be affected by that age range change and based upon previous admissions data

It should be noted that without the proposed change schools with falling rolls will also see a fall in funding, age range changes will deliver this reduction in funding at an earlier point.

20. Pupil Numbers

The operational guidance for local authorities is exceptionally clear that where authorities have organisational change, including those resulting from age range change, authorities should use weighted pupil numbers that reflect the changes in pupil numbers at the start of the academic year i.e. for the 2014/15 financial year this should be 5/12 of the October 2013 census and 7/12 of an estimate for September 2014 and all modelling has been completed on this basis.

The EFA have confirmed that academies will be funded in 2014/15 based upon the same pupil count used by the local authority for the 2014/15 academic year which in this instance would be the estimated September 2014 pupils.

- a) The formula working group debated at length the impact of moving from a lagged funding system to one of actual numbers and that it saw schools effectively losing funding for pupil that it hasn't taught i.e. the September 2014 reduction in pupils wouldn't drive any funding allocation for the 2014/15 budget but that of 2015/16 without an in year change. There were mixed views within the group of whether Leicestershire should introduce the changes and leave schools to respond individually to changes in numbers, for the reasons discussed in Paragraphs 12 & 13 this is not a recommended option.

Following the third meeting of the formula working group the EFA were again challenged on this position who have responded with the following;

'We have been very clear as you say that we will fund academies accordingly if authorities do not vary pupil numbers and recoup what we feel is an appropriate amount because there is no separate pot of money. It has to be funded from your DSG envelope again as it would have done in the past and as is the case for the growth fund, new basic needs schools etc. On a process point, the request to vary pupil numbers is from the authority and does not require forum approval'

- b) The proposal is that 2014/15 budgets are constructed using a weighted average of 5/12 of the 2013 autumn census and 7/12 of September 2014 estimates. The September estimates will be taken from 2014 admissions data for secondary schools. For primary schools retaining a year group it will be assumed that there will be full retention of the previous year group i.e. in a school retaining year 6 it will be assumed that all year 5 pupils are retained.
- c) Where a school already has a particular Key Stage and numbers will see an impact from its own age range change i.e. a Key Stage 4 school extending to Key Stage 3, no Key Stage 4 adjustment will be made as Key Stage 3 pupils will progress to Key Stage 4.
- d) If a school is gaining one year group and losing another, the net growth or loss of pupils will be used within the formula.
- e) The school finance regulations do not allow adjustments to budget in year and adjustments must be in the following year's budget. It is proposed that;

Schools with Falling Rolls	Schools with Increasing Rolls
If actual intake is higher than estimate the additional pupils will be funded the following year	If actual intake is higher than the estimate it will be deemed to be demographic growth and not funded
If intake lower than estimate no adjustment will be made	If intake lower than estimate pupils will be reduced in the following year

- f) By adjusting pupils in the following year it will be possible to ensure that schools with growing rolls receive the appropriate level of funding and schools with falling rolls are not doubly affected by the change. It also provides some resilience to demographic changes where it would be unfair to fund an age range change school and not a school unaffected by age range changes.

21. Protection for Schools with Falling Rolls

- a) Within the lagged funding system the loss of funding for reductions in September pupil numbers is not seen until the following years budget, adjusting pupil numbers as described in paragraph 20 will introduce a 'real time' movement in budget in the years of operation. The implication of this is that schools will effectively lose funding for pupils it has not yet been funded for i.e. the change in

pupil number count will reduce the 2014/15 budget for pupils in September 2014 - with lagged pupil funding they would not normally receive that funding until 2015/16.

- b) As a result of this 'real time' budget reduction schools will not have sufficient planning time to effect measures to reduce expenditure, it is appropriate that some level of protection is offered to schools.
- c) Initial 2014/15 modelling has identified that schools affected by age range change are estimated to lose c£3.3m. This change is purely the result of the changed method of counting pupils and on top of any impact of a reduced September 2013 pupil count.
- d) It is proposed to protect schools for the first year they are financially affected by another school undertaking an age range change. A school may be affected by changes from more than one school, in this instance protection will be offered for the first year of each change.
- e) The cost of protection will be met from a hierarchy of formula factors which will first draw on any headroom in the DSG settlement, secondly (if necessary) reduce the percentage ceiling on gains from formula changes and finally (if necessary) reduce the per pupil entitlement.
- f) For 2014/15 reducing the ceiling on gains to 1.5%, which is in line with the Minimum Funding Guarantee (MFG), will generate approximately £2.2m and fund 66% of the loss to schools. For 2014/15 it is proposed to fund protection at 80%, this will require a reduction in the per pupil entitlement of 0.17%. Whilst the affordability of this will need to be reviewed on an annual basis, the ceiling on gains will be fixed at 1.5%.
- g) The higher level of protection of 80% in 2014/15 is justified given that schools have not had time to plan for the change in the pupil count methodology.
- h) Local authorities are able to retain a small fund to support good schools with falling rolls where demographic data shows a future need for those places in the near future. The nationally set criteria for the allocation of this funding will not allow the local authority to provide support for schools affected by age range changes. However, if it were to be the case that it could be used that funding would need to be found within the total DSG in a similar manner to that referred to within paragraph 21 e).
- i) Any level of protection must be affordable and sustainable. There is no information as yet of how future school funding reform may affect the proposals, it will be necessary therefore to reconsider school protection on an annual basis

22. Minimum Funding Guarantee

- a) MFG protects school funding on a per pupil basis comparing the budget for the new year with that of the previous year. The formula provides a higher per pupil entitlement at Key Stage 4 than Key Stage 3, without adjusting the MFG calculation schools gaining Key Stage 4 pupils would receive inappropriate high levels of protection.
- b) It is proposed to recalculate the 2013/14 budget reprofiling the pupil numbers as that for 2014/15 i.e. in 2014/15 pupil numbers show that a school has 63% of pupils at Key Stage 3 and 37% at Key Stage, the MFG baseline for 2013/14 would be calculated on the same basis to give an average per pupil value.

Consultation

23. Consultation on the principles around the change was undertaken in June, this gained school views on the methodology for the pupil count and protection for schools with falling rolls. There was no consensus view on the proposals with responses very much driven by how individual schools would be impacted upon by the changes. A second consultation was released to schools at the point this report was released and is shown at Appendix. The consultation, as a result of the powers the EFA have, is not on whether the change should be implemented but on the criteria and factors contained within the proposal. The consultation period is short given the timescale and responses are required back by September 25th.
24. The Departmental Management Team within the Children and Young People's Service will consider the outcome of consultation on the proposals and may adjust the proposal submitted to the EFA as necessary.
25. Schools Forum comments on the proposals will be captured through the minutes of this meeting and an update on the outcome of the submission to the Secretary of State will be given at the meeting of the Schools Forum on 26 November.

Resource Implications

26. Local authorities, as with schools, are funded on lagged pupil numbers, this means that for schools expanding as the result of an age range change in September 2014 the local authority receives no additional funding for those pupils. Schools are able to plan for some of the changes but will not have been able to plan for the change in the pupil count methodology and will need a level of funding protection in order that they are able to plan in a measured manner for the change.

Equal Opportunity Issues

27. The objective of school funding reform is to ensure that pupils with the same characteristics are funded in the same manner.

Background Papers

Schools Forum 20 June 201 – School Funding 2014/15

Schools Forum 18 September 2012 – 2013/14 School Funding Formula – Primary and Secondary Schools

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Appendix 1School Funding 2014/15Proposal to Vary the Pupil Numbers for 2014/15 Budgets in schools affected by Age Range Changes

To ensure compliance with the operational guidance issued by the Education Funding Agency (EFA) for determining 2014/15 school budgets, Leicestershire County Council is required to respond to the funding needs of schools undertaking age range changes by using weighted pupil numbers within the 2014/15 funding formula and for all years in which further age range changes are implemented.

The local authority in conjunction with a Formula Working Group Commissioned by the Schools Forum has formulated proposals for submission to the Secretary of State for Approval on 30 September 2013 on a change to the pupil number count to reflect the significant pupil number changes in the academic year that best meet the needs of all schools in Leicestershire. This proposal is set in the context of Leicestershire receiving no additional funding in respect of these changes and the ability for EFA to remove funding if the local authority fails to act in order to meet the needs of schools with growing rolls which are the result of significant organisational change

Reports considered by the Schools Forum on 20 June 2013 and 18 September 2013 can be viewed on the following link:

<http://politics.leics.gov.uk/ieListMeetings.aspx?Committeeld=1018>

Schools affected by these changes will be:

- 1) Schools undertaking an age range change
- 2) Schools that are historic feeder school links to schools undertaking age range where their number on roll will be affected by that change which will be determined from previous admissions patterns

Leicestershire has accepted the position that change must be implemented following robust challenges to the EFA and the changes that allow the EFA to remove funding from Leicestershire should changes not be implemented. The Schools Forum has also considered the issue and has stated that it is not appropriate, nor affordable, for one pupil to be funded in two separate schools at the same time. Whilst the EFA have funded academies for the 2013/14 academic year for increased pupil numbers, it has also stated that further funding is not available for this position to continue.

Your views are invited on the following elements of the proposal;

1 - Pupil Number Estimates

To implement the changes it is necessary to use weighted pupil numbers in order to calculate the 2014/15 financial year budget for maintained schools

Weighted numbers will result in budgets for the financial year for maintained schools being based upon 5/12 of numbers from the autumn 2013 census and 7/12 of September 2014 pupil estimates. For academies the EFA will fund the academic year budget using the September 2014 estimates.

The local authority intends to take the following approach to estimating pupil numbers;

- Pupil numbers from the September 2014 admissions data for secondary schools
- For primary schools retaining an additional year group it will be assumed that all pupils in the previous year group will remain

Do you feel this methodology for determining Weighted Pupil Numbers is appropriate?

2 – Adjusting Pupil Numbers for Actual September 2014 Numbers.

The School and Early Years Finance (England) Regulations 2012 prohibit local authorities from making corrections to pupil numbers once the schools budget has been set. In order that schools are funded for the correct number of pupils it is proposed that numbers are adjusted in the following financial year in the following manner;

Schools with Reducing Rolls

If the actuals are higher than estimated the additional pupils will be added to the following year pupils

If lower than estimate no adjustment will be made

Schools with Increasing Rolls

If the actuals are higher than estimated no adjustment will be made

If lower than estimate an adjustment will be made in the following financial year.

Do you feel this basis for correcting pupil estimates is appropriate?

3 – Protection for Schools with Falling Rolls

In planning for age range changes schools with a falling September 2013 roll have been able to recognise the reducing numbers in budget planning. For the first year of a change and specifically for 2014/15 because of implementation of weighted pupil numbers, the reduction in funding is unplanned.

It is proposed that schools with falling rolls will be granted 80% protection against the drop in pupil numbers taken into the 7/12 element of the pupil count i.e. if a school is expected to lose 200 pupils in September 2014 the maximum loss will be 160. It is proposed that funding protection will be offered for the first year in which a school is affected by any change in age range in another school.

Do feel that protection should be at 80% and for the first year a school is affected by a falling roll as a result of age range changes?

4 – Funding School Protection

The funding for protection of schools will be found within the overall funding envelope for Leicestershire Schools. Protecting schools for 80% of the falling roll requires reductions in other elements of the school formula, it is proposed that the following hierarchy be used to provide funding protection;

1. Any Headroom within the overall Dedicated Schools Grant settlement
2. Reducing the ceiling on schools gaining through formula changes to plus 1.5% per pupil (Ceiling is 4% for 2013/14)
3. A reduction in the per pupil entitlement in all Key Stages

Do feel this approach to funding school protection is appropriate?

5 – Minimum Funding Guarantee

Protection through the Minimum Funding Guarantee (MFG) ensures that school budgets do not fall more than minus 1.5% per pupil from that received in the previous year. Funding rates for Key Stage 4 are higher than those for Key Stage 3 this would mean that for schools being funded for Key Stage 4 pupils for the first time would receive large funding increases if un-moderated.

It is proposed that for affected schools that the 2013/14 budget used as the comparison is profiled to reflect the percentage of the September numbers at both Key Stages. To illustrate this point if the September number on roll showed 63% of Key Stage 3 pupils and 37% Key Stage 4, the number of September 2013 pupils

would be re-profiled to this same percentage.

Do feel the proposal to amend the basis of calculation for the Minimum Funding Guarantee is appropriate?

Once completed please return the consultation by email no later than September 25th to jenny.lawrence@leics.gov.uk



Schools Forum

18 June 2013

Draft Work Programme 2013/14 Academic Year

The items contained within this draft work programme will be subject to amendment in order to reflect the changing nature of the educational landscape and the manner in which the local authority is required to respond to that change.

Date of Meeting	Agenda Items
26 November 2013	2014/15 School Funding – Outcome of application to vary pupil numbers 2013/14 Schools Budget Outturn Forecast SEND and Approach to Personalisation School Place Planning Results of Consultation on the Future of Oakfield
13 February 2014	2014/15 Schools Budget Arrangements for Excluded Pupils and Pupils at Risk of Exclusion
16 June 2014	SEND and Personalisation 2013/14 Schools Budget Outturn 2015/16 School Funding Schools Forum Membership for the 2014/15 Academic Year
18 September 2014	Election of Chair and Vice Chair 2013/14 School Balances 2015/16 School Funding

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