

Appendix A

Application 1

In 2013/14 a new split site definition was agreed by School's Forum and is intended to contribute towards the additional cost incurred by schools that operate across separate sites. If a school meets the criteria as set out by the Schools' Forum, funding is provided on the basis of a lump sum of **£120,000**.

In 2013/14 Split site factor was applicable to only Greenleas Lower School and as the school becomes a split site from 1st September 2013 the allocation provided to Greenleas for 2013/14 was 7/12 of £120,000 = £70,000. Last year we also had the approval from EFA to exclude this from the MGF calculation.

We are requesting to exclude the £70,000 from 2013/14 baseline and £120,000 from 2014/15 baseline so the school is protected with appropriate level of protection. However we will be consulting all schools/academies in September 2013 and we will let you know if any changes made to the split site definition and/or amount allocated.

Response to Application 1

From: ReformTeam.FUNDING@education.gsi.gov.uk
[mailto:ReformTeam.FUNDING@education.gsi.gov.uk]
Sent: 05 July 2013 09:00
Subject: RE: 4. Central Beds - MFG Exclusion - Split site

This is to let you know that the Secretary of State intends to approve your request, once the regulations are laid, for a MFG exclusion from both the 2013/14 and 2014/15 baselines relating to the split site arrangement for Greenleas Lower School. Details of the approved exclusion, including appropriate commentary, should be included in your October APT submission.

We will confirm this formally when the regulations have been laid later in the year.

Please note, your other requests have been escalated for a decision and we expect to respond before the end of July.

Application 2

Rent

Central Bedfordshire is requesting approval of Rent as a new exceptional premises factor to be used in 2014/15 formula.

Schools listed below incur significant costs in the form of rent charges for use of the land and buildings as a school. The table below shows the estimated cost incurred by each school. For majority of the schools affected the cost is more than 1% of school's total budget.

Only 9 school are affected from such costs which represent 6.6% of the schools (including academies) in the authority.

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School	Estimated Expenditure	Estimated Total Schools Budget	%
Eversholt Academy	5,867	308,836	1.9%
Everton Lower	145	261,098	0.1%
Gravenhurst Lower	244	240,019	0.1%
Husborne Crawley Lower	6,700	291,050	2.3%
Ridgmont Lower	11,450	248,825	4.6%
Southill Lower	3,800	298,575	1.3%
Stondon Lower	7,368	443,471	1.7%
Woburn Lower	4,000	340,389	1.2%
Kings Houghton Academy	8,760	1,994,246	0.4%

Total number of schools	136
Number of Schools affected	9
% of Schools affected	6.6%

Exclusion of Rent from MFG for 2014/15

If Rent is approved as a new exceptional factor then we propose that this factor is excluded from the 2014/15 base funding. As this factor is a new premises factor in 2014/15 the it would be appropriate to exclude this from MFG calculation to ensure that schools/academies affected are protected with appropriate levels of MFG.

Joint Use

Last year we received approval for this factor for Cedars Upper Academy. We can confirm that the criteria for exceptional premises factor is still met for 2014/15. As per operational guidance we can still use this factor in 2014/15. Can you please confirm this?

From: ReformTeam.FUNDING@education.gsi.gov.uk
[mailto:ReformTeam.FUNDING@education.gsi.gov.uk]

Sent: 10 July 2013 08:08

Subject: RE: 3. Central Bedfordshire - Exceptional Factor Request - response

This is to let you know that the Secretary of State intends to approve your application, once the regulations are laid, for an exceptional premises factor relating to rent for six schools: Eversholt Academy, Husborne Crawley Lower, Ridgmont Lower, Southill Lower, Stondon Lower and Woburn Lower. The factor cannot be permitted for the other 3 schools listed as the costs fall way below the criteria of 1% of 13-14 ISB. Details of this should be provided in your October APT submission.

The Secretary of State has not approved your request for a MFG exclusion in respect of this exceptional premises factor. This is because rent was a factor in your formula in 12-13 so it will already have been taken into account in schools' 13-14 MFG calculations.

We will provide a formal confirmation of the above once the regulations have been laid.

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Also, to confirm the joint use exceptional factor you received approval for in your 13-14 formula can continue with the condition that the criteria is still met. We will check this as part of your Oct APT submission.

Finally, your request to vary pupil numbers has been escalated to the minister and we expect to respond with a decision by the end of the month.

Application 3

Application to the Education Funding Agency to vary pupil numbers in 2014/15 formula funding

Central Bedfordshire is requesting approval **in principle** to vary the application of The School and Early Years Finance Regulations 2013 and disapply the use of October census data for specific schools with the intention to more accurately reflect pupil numbers in schools and academies affected by changes of age range in the Dunstable and Houghton Regis area of Central Bedfordshire during the financial year 2014-15 in the calculation of the basic entitlement funding of those schools.

There are currently 133 mainstream schools (academies and maintained) in Central Bedfordshire, with a potential 21 schools implementing changes in age range during the financial year 2014-15 retaining or admitting pupils into new year groups with further schools potentially impacted by a corresponding reduction in pupil numbers as a result.

The proposed variation is intended to ensure that funding follows the child and if approved it would disapply the use of the October census as the basis for establishing the basic entitlement to calculate the MFG and instead use an estimated weighted average of pupil numbers.

This initial request to the EFA is the first in a two stage application process and is intended to establish the likely acceptability of draft parameters for the variation proposed by the Council.

Full modelling and impact analysis for all schools/academies affected will be undertaken at the second window of application if the draft variation is agreed in principle by the EFA.

Basic Entitlement

It is proposed to vary pupil numbers of the **schools/academies** affected as follows:

Lower

Lower schools and Academies who have received Council or EFA approval to become Primary schools from September 2013 will be retaining Year 5 children into Year 6 for the first time in September 2014.

It is assumed that all year 5 children will remain in the Primary in year 6 from September 2014.

For Primary Schools affected in this way we are proposing that basic entitlement is applied using total actual pupil numbers as at October 2013 plus 7/12 of Year 5, which will become year 6 from September 2014.

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Lower schools and Academies who have or expect to receive Council or EFA approval to become Primary schools from September 2014 will be retaining Year 4 children into Year 5 for the first time in September 2014.

It is assumed that a significant proportion of Year 4 children will remain in the Primary into Year 5 from September 2014.

For Primary Schools affected in this way we are proposing that basic entitlement is applied using total actual pupil numbers as at October 2013 plus 7/12 of Year 4, which will become year 5 from September 2014.

It is a possibility that not all pupils in year 4 will be retained into Year 5 in a new Primary School with parents expressing a preference to transfer their children into a different school with a Year 5 admission point. Funding for the Primary that is based on an assumption of full retention of Year 4 pupils could therefore lead to significant over funding of the school. To mitigate this we are also proposing that a claw back mechanism be put in place so funding will be adjusted when actual pupil numbers for year 5 as at October 2014 are known.

Middle

Total pupil numbers in Middle schools would ordinarily remain reasonably static year on year without significant variances in the short term. However if one or more of its traditional feeder Lower schools changes its age range then this will undoubtedly impact Year 5 admission numbers to Middle schools in that area.

Likewise, where a traditional receiver Upper School in the area changes its age range to offer a Year 7 admission point, in addition to a Year 9 admission point in the transition to full secondary provision, the middle school may well also see a significant impact in the loss of pupils at the end of Year 6.

For Middle schools affected in this way we are proposing that basic entitlement is applied using total actual pupil numbers as at October 2013 less 7/12 of pupil numbers in Year 5 and 6. The assumption here is that from September 2014 the Middle schools affected have no year 5 admissions, which remain in a primary school, and no Year 7 children which would be transferring to Year 7 offered from a Secondary school.

Applying the above variation for affected Middle schools will result in a significant loss of funding. However, should the school attract Year 5 admissions and retain Year 7 pupils then the overestimated payment to the Primary and Secondary Schools will be recouped to pay to the Middle for actual pupils attending as at October 14.

At this stage we are not proposing to pay protection to Middle schools.

Upper

An Upper school implementing a change to Secondary in 2014/15 would offer a Year 7 admission point from September 2014 for the first time, in addition to its traditional Year 9 admission point.

For an Upper school in this position we are proposing that basic entitlement is applied using total actual pupil numbers as at October 2013 plus 7/12 of estimated pupil numbers for Year 7 from September 2014.

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It is a possibility that the above estimation of pupil number for Year 7 in Upper schools could be over/understated which could lead to inappropriate distribution of funding for Upper schools affected.

To mitigate this we are also proposing that a claw back mechanism be put in place so that funding will be adjusted when the actual pupil numbers as at October 2014 are known.

MFG

We are also seeking approval to use the above adjustment to pupil numbers for the MFG calculation to avoid the pro rata of formula factors being almost entirely mitigated for schools with reducing pupil numbers and also to provide protection for those schools with significant increases in numbers at September 2014.

From: ReformTeam.FUNDING@education.gsi.gov.uk
[mailto:ReformTeam.FUNDING@education.gsi.gov.uk]

Sent: 22 July 2013 09:33

Subject: RE: 5. Central Beds - Vary of pupil numbers for 2014/15

This is to let you know that the Secretary of State intends to approve your request *in principle*, and once the regulations are laid, for a variation to pupil numbers relating to the 21 schools changing age ranges in 2014-15. As you have outlined, we will need to see more detail from you on the estimates of pupil numbers. However, please note it will not be possible to adjust the pupil numbers in-year once the October 2014 census information is available, this can only happen in your 2015-16 formula and will be subject to what is allowed under a National Funding Formula.

We look forward to receiving your detailed pupil number estimates when these are available.
