

Appendix A

Proposed change to the Barnet School Funding Formula for 2016-17

Local authorities are required to review the main funding formula for schools and consult with the Schools Forum each year, whether schools have asked for a change or not.

Following the simplification of the pre 2013/14 Barnet formula to meet government regulations, a significant proportion of schools are now dependent on the minimum funding guarantee (MFG) to ensure they do not lose more than 1.5% year on year in their budget share per pupil. The total cost of the MFG, over and above the formula, currently stands at £3.2m. For this to be affordable there is a cap on schools gaining year on year. This has been set at +0.5%, so schools lose everything above that threshold. Some schools, although still gaining on previous years, see a very large cap on their formula funding.

In our annual review of the formula we modelled different scenarios to see if this group of schools could be helped within the following parameters:

- The Individual Schools Budget (ISB) for all schools should not increase
- Other schools should not lose significantly.

By using a different kind of capping system, allowed within the Authority Proforma Tool (APT), for calculating budget shares, gains can be scaled rather than cut off completely at the threshold. By setting the threshold at 0% rather than +0.5% and scaling at about 15%, schools gaining between 0 and 0.5% lose a little, but those gaining more keep an amount which could make a real difference. This also creates a little headroom to add £10 to the Age Weighted Pupil Unit (AWPU).

All schools were consulted on 3 options:

Option 1: No change

Option 2: Gains scaled at 20%

Option 3: Gains scaled at 15% plus £10 added to the AWPU

The consultation response rate was around 30% of mainstream schools and academies, and a majority (55% of these) preferred Option 3. The next most popular was no change (32%). When discussed with the Schools Forum on 15th October, the meeting recommended that the local authority should change to Option 3.

Barnet was required to submit a provisional APT to the DfE by 30th October and therefore the Commissioning Director was asked to approve the submission based on the recommended new formula, rather than that used for 2015/16.

Overleaf is a comparison for all schools showing the estimated difference between what they would receive under the 2015/16 formula and the proposed amended version. The data used is provisional. Where we have actual pupil numbers from the October 2015 census (most maintained schools) we have used them, but for academies we have had to use estimates. Other data (FSM6, IDAC1, EAL, mobility) is from the October 2014 census, as we do not receive this information until December.

In summary, 77% of schools gain, or are unaffected by the change to Option 3. Gains are mostly under £8,000. Those gaining more than that in 2016/17 are:

School Name	Increase	%
The Orion Primary School	47,463	1.27%
St. James' Catholic High School	38,016	0.79%
Blessed Dominic School	18,111	1.13%
Mill Hill County High School	12,150	0.19%
East Barnet School	10,520	0.19%

Of the 26 schools which would be worse off under the change, most would lose less than £7000, but four would lose more as follows:

3025400	Hendon School	-	10,961	-0.19%
3025401	Queen Elizabeth's School	-	11,403	-0.25%
3025405	Finchley Catholic High School	-	17,173	-0.38%
3024215	The Compton School	-	20,813	-0.36%

As shown in the table below, the cost of the MFG would drop slightly but the amount we would be reclaiming via the cap would rise. Even so, the net cost of the MFG is £841,000. We are not allowed to take more back via the cap than we pay in MFG top-ups but in the event of being unable to balance the budget in any other way we could increase the total cap so that the net cost of the MFG reduced.

It is important to bear in mind that the funding a school receives one year sets a baseline for future years. For schools on the MFG their baseline will drop by 1.5% per annum until it reaches the level of the funding formula, but allowing schools to gain on previous years sets the baseline higher for future years, thus 'locking in' the cost forever. The relatively small change proposed would have a minimal effect in this respect.

	1. Current		2. Option 3	
	Current rate	Total spend	Current rate	Total spend
	£		£	
Primary AWPU	£ 3,316	£ 187,225,959	£ 3,326	£ 187,707,907
Secondary AWPU	£ 4,763		£ 4,773	
Deprivation		£ 26,999,564		£ 26,999,564
EAL		£ 4,460,024		£ 4,460,024
Mobility				
Lump sum		£ 14,030,000		£ 14,030,000
Split sites		£ 285,580		£ 285,580
Rates		£ 1,348,733		£ 1,348,733
Pre-MFG spend		£ 234,349,860		£ 234,831,808
MFG top up		£ 3,184,438		£ 3,074,601
MFG MFG cap		-£ 1,999,591		-£ 2,233,212
Net cost of MFG		£ 1,184,847		£ 841,389
Total Schools block spend		£ 235,534,707		£ 235,673,197
Change in total from current				£ 138,490

LAEST	School Name	Increase	%
3022077	The Orion Primary School	47,463	1.27%
3025407	St. James' Catholic High School	38,016	0.79%
3023511	Blessed Dominic School	18,111	1.13%
3025402	Mill Hill County High School	12,150	0.19%
3024212	East Barnet School	10,520	0.19%
3024003	Friern Barnet School	7,940	0.17%
3022014	Colindale School	6,550	0.24%
3023304	Holy Trinity School	6,156	0.61%
3023519	Broadfields Primary School	6,040	0.22%
3023502	St Agnes RC Primary School	5,800	0.43%
3024001	The Archer Academy	5,385	0.18%
3023523	Martin Primary School	5,205	0.21%
3022002	Barnfield School	4,810	0.21%
3022032	Holly Park School	4,720	0.24%
3022079	Beis Yaakov	4,540	0.27%
3022052	Summerside Primary School	4,490	0.22%
3022076	Wessex Gardens Primary School	4,380	0.21%
3024211	Christ's College Finchley	4,223	0.11%
3022047	The Hyde School	4,140	0.22%
3022043	Moss Hall Junior School	4,120	0.25%
3022017	Cromer Road Primary School	4,060	0.24%
3022003	Bell Lane Primary School	3,980	0.22%
3022007	Brookland Junior School	3,580	0.25%
3022027	Garden Suburb Junior	3,550	0.24%
3023509	St Joseph's Catholic Primary School	3,465	0.19%
3022072	Queenswell Junior School	3,360	0.22%
3024000	St Andrew the Apostle Greek Orthodox School	3,263	0.17%
3022042	Monkfrith School	3,020	0.25%
3023501	Our Lady of Lourdes School	2,697	0.29%
3022078	Pardes House School	2,638	0.25%
3022054	Woodridge Primary School	2,390	0.24%
3022070	Sunnyfields Primary School	2,060	0.20%
3026080	Menorah Girls Grammar	2,000	0.18%
3025409	Hasmonean High School	1,959	0.04%
3025406	Ashmole Academy	1,713	0.03%
3023514	Annunciation Junior School	1,654	0.17%
3022001	Etz Chaim Jewish Primary School	1,563	0.24%
3022048	Millbrook Park CE School	1,510	0.23%
3022004	Rimon Jewish Primary School	1,192	0.22%
3022020	Alma Primary	1,075	0.22%
3029996	Watling Park Free School	950	0.17%
3026089	Menorah Boys Grammar	875	0.17%
3024752	The Henrietta Barnett School	728	0.03%
3025404	St Michaels Catholic Grammar School	717	0.03%
3023520	Akiva School	631	0.04%
3023311	St Mary's C E Primary School N3 1BT	629	0.04%
3023510	Sacred Heart School	628	0.04%
3023512	Rosh Pinah	591	0.04%
3023513	Menorah Primary School	585	0.04%
3023500	The Annunciation Catholic Infant School	503	0.07%
3023521	St Mary's & St John's	502	0.01%
3024208	Queen Elizabeth's Girls' School	386	0.01%
3023507	ST. THERESA'S R.C. PRIMARY SCHOOL	362	0.04%
3022011	Church Hill Primary School	355	0.04%
3025403	St Mary's CE High School	325	0.13%
3023312	St Mary's School EN4	324	0.04%
3023307	St John's CE School N11	315	0.04%
3023316	Trent C of E Primary School	314	0.04%
3023314	St Pauls CE Primary School	312	0.04%
3023516	Hasmonean Primary School	311	0.04%
3023309	St Johns N20	306	0.04%
3023302	Christ Church CE Primary School	302	0.04%
3025948	Mathilda Marks-Kennedy School	300	0.04%

Modelling to illustrate schools that may gain under the revised formula

LAESTA	School Name	Decrease	%
3022009	Brunswick Park Primary & Nursery School	-	0.00%
3022010	Child Hill School	-	0.00%
3022015	Coppetts Wood	-	0.00%
3022016	Courtland School	-	0.00%
3022019	Deansbrook Infant School	-	0.00%
3022023	Edgware Primary School	-	0.00%
3022025	Foulds	-	0.00%
3022031	Hollickwood JMI School	-	0.00%
3022036	Livingstone School	-	0.00%
3022037	Manorside Primary School	-	0.00%
3022041	Sacks Morasha Jewish Primary School	-	0.00%
3022045	Northside School	-	0.00%
3022055	Tudor School	-	0.00%
3022057	Underhill School	-	0.00%
3022060	WHITINGS HILL PRIMARY SCHOOL	-	0.00%
3022071	Queenswell Infant & Nursery School	-	0.00%
3023522	Claremont Primary School	-	0.00%
3023524	Beit Shvidler Primary School	-	0.00%
3025408	Bishop Douglass School	-	0.00%
3025427	Jewish Community Secondary School	-	0.00%
3022024	Fairway Primary School	-	0.00%
3022030	Grasvenor Avenue Infants	-	0.00%
3022038	Parkfield Primary School	-	0.00%
3024009	The Totteridge Academy	-	0.00%
3024012	Whitefield School	-	0.00%
3026905	London Academy	-	0.00%
3026906	Wren Academy	-	0.00%
3023315	St Andrew's C E	- 131	-0.02%
3022008	Brookland Infant & Nursery School	- 168	-0.01%
3023305	Monken Hadley C E Primary School	- 282	-0.04%
3022028	Garden Suburb Infant School	- 1,281	-0.11%
3022029	Goldbeaters Primary School	- 1,361	-0.06%
3023300	All Saints Primary School	- 1,624	-0.16%
3023317	All Saints' CE Primary School N20 9EZ	- 1,844	-0.18%
3023515	Independent Jewish Day School	- 2,147	-0.27%
3024210	COPTHALL SCHOOL	- 2,239	-0.04%
3022021	Dollis Infant School	- 2,304	-0.18%
3023313	St Paul's School N11	- 2,554	-0.27%
3025200	Dollis Junior School	- 2,955	-0.18%
3025201	Osidge Primary School	- 3,209	-0.19%
3023506	St Vincent's Catholic Primary School	- 3,599	-0.27%
3025949	Menorah Foundation School	- 3,870	-0.34%
3022067	Chalgrove Primary School	- 3,910	-0.33%
3022044	Moss Hall Infant School	- 5,000	-0.32%
3022026	Frith Manor School	- 5,288	-0.21%
3023518	Woodcroft Primary School	- 5,374	-0.24%
3023504	St Catherines RC Primary School	- 5,723	-0.33%
3022073	Danegrove JMI School	- 6,501	-0.24%
3022018	Deansbrook Junior School	- 6,530	-0.34%
3025400	Hendon School	- 10,961	-0.19%
3025401	Queen Elizabeth's School	- 11,403	-0.25%
3025405	Finchley Catholic High School	- 17,173	-0.38%
3024215	The Compton School	- 20,813	-0.36%
	TOTALS	138,490	

Modelling to illustrate schools that may be unaffected or lose under the revised formula

