



## CUMBERLAND SCHOOLS FORUM

2 November 2023, Microsoft Teams Meeting, 9.30am

### AGENDA

#### PART 1: ITEMS LIKELY TO BE CONSIDERED IN THE PRESENCE OF THE PRESS AND PUBLIC

1. **Apologies for Absence**
2. **Exclusion of Press and Public**  
To consider whether the press and public should be excluded from the meeting during consideration of any item on the agenda.
3. **Declarations of Interest**
4. **Minutes of Previous Meeting and Matters Arising (copy enclosed)**  
- 18 September 2023
5. **Schools Funding Formula 2024-25 – Consultation Outcome (copy enclosed)**
6. **Maintained Schools De-Delegation 2024-25 (copy enclosed)**
7. **Proposed Early Years Funding Formula 2024-25 (copy enclosed)**
8. **Delivering Better Value in SEND Update (copy enclosed)**
9. **Dates of Future Meetings**
  - i) The next meeting of the Schools Forum will be held on 16 January 2024. The meeting will begin at 9.30am and is likely to be held via Microsoft Teams. Final arrangements will be circulated prior to the meeting.
10. **Any Other Business**

**PART 2: ITEMS LIKELY TO BE CONSIDERED IN THE ABSENCE OF THE PRESS AND PUBLIC**



## CUMBERLAND SCHOOLS FORUM

### Draft MINUTES OF THE MEETING HELD ON 18 September 2023 via Microsoft Teams

#### **PRESENT**

James Blackwell (Maintained Primary)  
Danny Gee (PRUs)  
David Grimshaw (Maintained Primary)  
Tom Hailwood (Maintained Secondary)  
Rhiannon Hughes (Maintained Nursery)  
Julie Jones (RC Diocese)  
Elaine Lynch (Cumberland Shadow Portfolio Holder – Education, Skills & Training)  
Chris McAree (Secondary Academy)  
Kuldip McMullan (Primary Academy)  
Michael Smillie (Secondary Academy)  
Laura Watson (CE Diocese)  
Kris Williams (Special Schools)

#### **Officers in Attendance:**

Dan Barton	(AD – Education and Skills)
Susan Milburn	(Group Accountant – People)
Amanda Chew	(Finance Manager)
Simon Nicholson	(Finance Manager)
Sophie Scott	(Finance)
Sally Senejko	(Senior Manager – SEND, Education & Inclusion)
Lesley Nixon	(Senior Manager – Learning Improvement Service)
Nicola Shiels	(Forum Support)

#### **Observers:**

None

#### **Apologies for Absence**

Charlotte Tudway (CE Diocese)  
Nerissa Nicholas (Maintained Primary)

## **PART 1: ITEMS LIKELY TO BE CONSIDERED IN THE PRESENCE OF THE PRESS AND PUBLIC**

### **1. Appointment of Chair**

Chris McAree, was appointed as Chair of the Cumberland Schools Forum for the coming year.

### **2. Appointment of Vice-Chair**

Michael Smillie was appointed as Vice-Chair of the Cumberland Schools Forum for the coming year.

### **3. Exclusion of Press and Public**

It was agreed that all items would be considered in the public domain.

### **4. Declarations of Interest**

There were no declarations of interest at this stage.

### **5. Minutes of Previous Meeting and Matters Arising**

The minutes of the meetings of the Schools Forum held on 13 June 2023 were agreed as an accurate record.

It was noted that a written update on Delivering Better Value in SEND would be presented at the November Schools Forum meeting. There were no matters arising from the minutes.

### **6. Schools Funding Formula 2024-25**

A national funding formula was introduced for schools from 2018-19 and since then local authorities had been able to decide in consultation with their schools and Schools Forum whether to use the NFF to allocate funding to schools or to apply a locally determined schools funding formula, within some restrictive parameters set by the ESFA.

In 2023-24 the DfE began the first year of transition towards a direct NFF whereby all schools (including academies) would be funded using one single NFF and placed further restrictions on local flexibility.

In 2023-24 the Cabinet members for Cumbria decided that the NFF would be used to allocate funding to schools and academies in Cumberland, as in previous years since the introduction of the NFF in 2018-19. When the final DSG Schools Block allocation for Cumberland was published by the Education Skills & Funding Agency (ESFA) in December 2022 and after applying the NFF in full and taking into account the Growth Fund budget there was an affordability gap of resulting in a small reduction in the basic per pupil funding factor compared to the NFF value. As there was no balance remaining in the Schools Block after applying the funding formula on this basis there was no transfer to the High Needs Block to support the budget pressures in 2023-24.

On 17 July 2023, the ESFA announced details of the dedicated schools grant (DSG) funding arrangements which, at a national level, would increase by £1.8bn in 2024-25 compared to this year. Of this, £440m was being directed to the High Needs Block. The DSG funding



was allocated in four blocks: Schools, High Needs, Early Years and Central Schools Services and, as in previous years, the ESFA had also published notional school-level allocations. Final allocations would be published in December 2023 and would include Early Years funding.

Funding allocations for 2024-25 compared to 2023-24 showed a total increase of £14.313m with the majority of the increase going to the Schools Block which would increase by £13.336m.

The Schools Block was made up of three elements – core NFF, premises factor and growth fund. Core NFF had increased by £13.064m and the premises factor by £0.272m. Details of the growth fund factor had not yet been published but would be based on observed differences between primary and secondary numbers on roll in each local authority between the October 2022 and October 2023 censuses and would be published at a later date. New for 2024-25, it would also include funding for falling rolls as well as growth.

From 2024-25 local authorities would need to provide growth funding where a school or academy had agreed with the local authority to provide an extra class in order to meet basic need in the area (either as a bulge class or as an ongoing commitment) that was at least £1,550 per pupil.

The increase in the Core NFF included the roll in of the Mainstream Schools Additional Grant (MSAG) of which £4,510 had been added to the lump sum factor and the remainder has been allocated on a per pupil basis. On top of these increases the basic per pupil funding factor, additional needs factors and the school lump sum had increased by 2.4%. The free school meals (FSM) factor would increase by 1.6%. The minimum per pupil funding levels had been set at £4,655 per primary and £6.050 per secondary pupil.

The settlement also allowed for an increase to the funding floor so that all schools and academies would attract at least 0.5% per pupil gain against their 2023-24 per pupil baselines which have been adjusted to include the MSAG. LAs would continue to be allowed to set a minimum funding guarantee (MFG) in local formulae, which must be between +0% and +0.5%.

The DfE continued to be committed to moving towards a 'hard' NFF. In 2023-24 LAs were required to bring their own formulae at least 10% closer to the direct NFF. This restriction was being applied again in 2024-25.

The recently announced new Teachers Pay Additional Grant introduced from September 2023 would not be included in the NFF in 2024-25 but would continue to be allocated to schools as a separate grant in 2024-25.

High Needs Block – Cumberland was estimated to gain £0.675m (2.43%) compared to 2023-24, subject to changes in pupil numbers and other later adjustments:

The HN national funding formula used to allocate funding to local authorities was broadly unchanged. This allowed for a minimum 3% increase per head of 2 to 18 population capped at 5% against the 2023-24 baseline. For Cumberland the per head gain was 3%, however the protection only applied to the proxy factors and the additional HN funding and excluded the basic, Alternative Provision (AP) factor and the import/export adjustment.

The historic spend factor within the formula was £11.188m which was the same amount allocated in 2023-24 and equated to 28% of the total funding estimated to be available in 2024-25.



The central services block was estimated to reduce by £0.041m compared to last year. The block was made up of two elements: ongoing responsibilities and historic commitments. The funding for ongoing responsibilities was estimated to increase by £0.070m subject to changes in pupil numbers and other later adjustments. The ESFA had been winding down the historic commitments funding since 2019-20 would reduce by (£0.111m). It was expected that the historic commitments element would continue to reduce on this basis in future years as there was an expectation that these commitments would eventually unwind completely. However, the historic commitments funding would be protected from dropping below the total value of ongoing prudential borrowing costs which for Cumberland was £0.127m.

It was a requirement that all maintained and academy schools were consulted on any changes to the local funding formula each year. Even if it was proposed to continue to follow the NFF, if the formula factors and/or the minimum funding guarantee (MFG) was different to that of the preceding year then we must consult with all schools on the changes. Following this consultation, Schools Forum would then be asked to make a recommendation to Executive on a proposed approach. Executive would then decide on the final school funding formula for 2024-25 which would impact maintained schools from 1 April 2024 and academies from 1 September 2024.

It was proposed that the Cumberland school funding formula mirrored the NFF in full in 2024-25 impacting maintained schools with effect from 1 April 2024 and academies from 1 September 2024. If there was a shortfall in Schools Block funding after allocating the funding on this basis and after taking account of the Growth Fund budget then it was proposed that this would be managed by reducing the basic per pupil funding factor in the formula.

If there was still a balance remaining within the Schools Block after applying the NFF in full and after taking into account the Growth Fund budget, it was proposed that up to a maximum of 0.5% is transferred to the High Needs (HN) block to support the ongoing budget pressures. Any residual balance remaining to be allocated to schools through the school funding formula by increasing the basic per pupil funding factor.

The report included an example draft consultation document on the assumption that the proposal would be supported by Schools Forum with three recommended questions to ask schools together with the illustrative impact on school budget shares. The consultation once finalised was planned to be launched on 25 September for a period of 3 weeks.

A shortfall or balance remaining in the Schools Block after allocating the funding using the NFF could arise due to the way that local authorities are funded. The actual primary and secondary units of funding at local authority level are based on October 2022 pupil data and changes in pupil characteristics such as eligibility for FSM or changes in attainment levels are not reflected in the primary and secondary units of funding used to allocate the core NFF funding to local authorities in 2024-25, only changes in pupil numbers are taken into account. It was anticipated that the number of children eligible for FSM would have increased between the October 2022 and 2023 census dates and therefore this could mean that applying the NFF in full would be unaffordable in 2024-25 when the final Schools block allocation was confirmed in December, as it was in 2023-24.

The Premises factor at local authority level, which was based on the previous year's actual spend would also have an impact on affordability.

In discussing the report, Schools Forum noted that FSM could have a significant impact on school budgets. Cumbria had written to DfE about this issue as the 2023-24 formula had not been affordable, primarily due to FSM. It was requested that at the point that the funding formula was presented to the Executive, elected members be clearly briefed about the



potential for a shortfall and how difficult it was to assess the impact until the final allocation was received.

Schools Forum members were asked to encourage constituents to respond to the consultation when it opened.

Schools Forum then:

- noted the provisional school funding settlement;
- supported the recommendation to consult all schools on the proposal to apply the National Funding Formula in full in 2024-25;
- supported the recommendation to apply the following principles if there was a shortfall or remaining balance after applying the National Funding Formula in full and after taking into account the growth fund budget:
  - if there was shortfall reduce the basic per pupil funding factor values in the formula;
  - if there was a remaining balance transfer up to 0.5% to the HN Block and allocate any leftover balance after that, if available, to schools by increasing basic per pupil funding factor values in the formula
- supported the example draft schools consultation documents and the three recommended questions to ask schools.

## 7. **Early Years Funding DfE Extension of Entitlements Consultation**

A report that was presented that updated Schools Forum about the extension of early years entitlements.

In Spring 2023 the government announced that they would be extending the early years free entitlements meaning that all working parents in England would be able to access 30 hours of free childcare per week for 38 weeks of the year from the term after their child turned 9 months old to when they start school. The extension of free entitlement would be rolled out in stages starting from April 2024.

DfE launched a consultation on 21 July which ran to 8 September. The LA broadly agreed with the proposals but the formula did not take into account rurality and this could impact on viability of early years providers as they would have fewer paying parents to subsidise free entitlement.

The extension of the early years entitlements and the changes to the local funding rules meant that consideration needed to be given to how early years providers were funded at a local level. From 1 April 2024 LAs must pass-through at least 95% of the new 2-year old and under funding it received to early years providers. It was recommended to Schools Forum that an element of this funding should be centrally retained to support the delivery of the roll out of the new entitlements.

Modelling of the proposed new local funding formulae for 2-year olds and under and the draft consultation with Cumberland early years providers and schools would be brought to the next Schools Forum meeting in November for consideration. The consultation outcome would be presented at the 16 January 2024 meeting when the Schools Forum would be asked to make a recommendation to Executive who would decide on the final new funding formulae at its meeting in February 2024.

Currently all parents of 3-4 year olds could access 15 hours of free early education for 38 weeks of the year and working parents could access an additional 15 hours of free



entitlement. Parents of disadvantaged 2-year olds could access 15 hours of free entitlement. The extension of the free entitlement meant that all working parents would be able to access 30 hours of free entitlement for 38 weeks of the year from the term after their child turns 9 months old. This would be rolled out in stages.

Funding for free entitlement was allocated to local authorities through a separate funding formula for 2-year olds and 3-4 year olds through the Early Years Block of the Dedicated Schools Grant. The DfE were not proposing to make any changes to way funding was allocated to local authorities for 3-4 year olds or the maintained nursery school (MNS) supplementary funding. The current funding formula for 2-year olds, made up of an hourly base rate multiplied by an area cost adjustment, was designed to fund disadvantaged 2-year olds only and the DfE were proposing new funding formulae that was suitable for a 2-year old and under cohort which included working parent families.

DfE proposed is to allocate funding at local authority level using the existing 3-4 year old funding formula for both the new 2-year olds and the under 2-year olds funding formula.

Funding rates would vary by age, with higher rates for under 2-year olds reflecting the difference in costs due to higher staffing ratios. The proposed new additional needs factor was to reflect the relative differences in general levels of disadvantage between areas. This factor was weighted at 10.5% of the total funding available at a national level of which 8% was targeted to deprivation with the remaining 89.5% of funding through the base rate. However, in a difference to the 3-4 year old funding formula, which only used FSM eligibility as measure of deprivation, it was proposed to use a combination of both FSM and IDACI in the new 2-year olds and under funding formulae.

Although the DfE were not proposing to make changes to the current 3-4 year old funding formula at this stage they had committed to review the additional needs factor and consider whether to also introduce IDACI there.

The current funding rate, for disadvantaged 2-year olds in Cumberland was £5.63. DfE have published illustrative hourly funding rates at LA level for 2024/25 and Cumberland had the sixth lowest funding rates out of 151 authorities.

DfE were proposing to apply the current rules that apply to 3-4 year old local funding to the 2-year old and under funding formulae. The pass-through rate would continue to be 95% for 2024-25 but the intention was to increase the pass-through rate to 97% in future years.

Cumberland currently used the mandatory supplementary Deprivation factor and a Quality factor to distribute the former teacher pay and pension grants to school-based providers in its 3-4 year old funding formula. Other allowable factors included flexibility, rurality/sparsity and English as an additional language.

The LA was obliged to consult with Schools Forum, schools and early years providers on any changes to the existing local funding formulae for 3-4 year olds, and the new 2-year olds and under 2-year olds local funding formulae. Timescales for consulting and finalising the shape of the funding formula would be tight as the 2024-25 Dedicated Schools Grant budget, which will included the proposed centrally retained Early Years budget for which the authority must receive Schools Forum approval for, was due to be presented on 16 January 2024 to meet with DfE deadlines.

Schools Forum members commented that there was no recognition of geographical spread and asked that the consultation paper be very clear about the principles of consultation. A



draft consultation paper together with how much the LA might need to retain would be presented to the next meeting in November.

Schools Forum noted:

- the extension of early years entitlements for 2-year olds and under and the changes to the local funding rules and the LA's response to the DfE's consultation;
- the recommendation that a portion of the new funding is centrally retained to support the rollout of the new free entitlements; and
- the requirement to consult early years providers and maintained schools on the new local funding formula and timeline for doing this.

#### **8. Homes for Ukraine Education & Childcare Grant**

Schools Forum received a report updating them on the spend to date against a government grant to help support the education of children that had arrived in the UK via the Homes for Ukraine (HfU) visa scheme.

A new one-off grant to support the education and childcare costs of children arriving into the UK via the Homes for Ukraine (HfU) visa scheme between 1 March 2022 and 28 February 2023 had been made available to local authorities. The grant allocation was based on an amount per child for claims submitted by the local authority, with the amount received depending on when the child arrived in the UK.

The grant could only be used for the provision of education and childcare for children aged 2–18 and for any funding passed onto the child's education or childcare setting the process should be as simple as possible.

Grant totalling £0.824m had been received for HfU children living in Cumberland and had to be spent by 31 March 2024. Actual spend to date was £0.646m, leaving £0.178m unspent. The under allocation was due to a number of reasons including not all children for which funding had been claimed for had attended school or early years provision during their stay in the UK, either because they were not at compulsory school age or for other reasons; they did not start attending school as soon as they arrived into the UK and some children had returned to the Ukraine.

Feedback from schools had indicated that the costs associated with supporting the education costs of HfU children had invariably been more than the grant allocation received. It was, therefore, proposed that the remaining grant allocation should be distributed to those schools/early years providers that had already received HfU funding with an uplift to each school's total allocation of 27.6%.

For those schools/early providers may where HfU children were no longer in attendance, the proposed additional grant could be used to offset costs already incurred. As with all other specific grants, schools must retain records of spend relating to the grant for audit purposes and evidence of compliance with the grant conditions.

Schools Forum noted the balance remaining against the grant of £0.178m and supported the proposed methodology for allocating the remaining balance to schools and early years providers by uplifting each school/early years provider's allocation by 27.6%.

#### **9. Maintained School Balances and Outcome of Excess Surplus Balances**

A report that presented the maintained schools projected net surplus balance position as at 31 March 2024 was considered. The report also presented the outcome of the of the excess



surplus balance policy that had been applied against maintained school balances as at 31 March 2023.

Based on school submitted May budget plans for 2023-24 a net surplus balance of (£0.721m) was projected as at 31 March 2024; the net surplus balances on maintained schools was (£4.806m) as at 31 March 2023.

21 schools had proposed deficit budgets for 2023/24 and were required to submit a deficit recovery plan. Eight schools had complied with this requirement but 13 schools had not yet submitted their plans and had been requested to submit them with their revised October budget plan submission.

Following the submission of the May budget plans, the government announced details of the new Teachers Pay Additional Grant to help schools meet the costs of the 2023-24 teacher pay award. The total expected grant for Cumberland mainstream and Special/PRUs schools was (£1.194m) therefore after taking this into account the revised projected net surplus balance as at 31 March 2024 was (£1.915m).

Details of the schools funding settlement for 2024-25 had been announced by DfE. The settlement reflected inflationary increases for schools in the National Funding Formula of 2.4% and a minimum funding guarantee of 0.5% against their previous year's funding baselines. The final school funding formula for Cumberland was subject to consultation and had not yet been confirmed. Despite this additional funding, given the inflationary pressures that schools were faced with. It was likely that school balances would continue to fall and this position was not sustainable.

In June 2023, Schools Forum noted that 36 schools had ended the 2022-23 financial year with an excess greater than 8% (primary, nursery, special schools) and 5% (secondary schools) of their total delegated budget shares. These schools were required to provide justifications and supporting evidence for the excess amount above these thresholds. The total value of the excess amount was £1.544m.

The returns had been reviewed by the finance team. The majority of justifications met the criteria in the policy relating to schemes of building work, furnishing or equipping, schemes of repair, expenditure planned for in 22-23 but occurring early in 23/24, unspent grants and other reasons.

The returns had been by the Assistant Director for SEND, Education & Inclusion, 20 schools had received approval to retain their excess balance and 10 schools had received conditional approval subject to providing further evidence by 30 September.

DfE considers the holding of small surplus balances by schools to be part of sensible financial planning but also that school budget shares should be spent for the benefit of pupils in school at that time. The surplus school balances policy puts appropriate challenge on to schools with excess surplus balances. However, given the amount of resource time taken up by schools in preparing and collating their evidence for their justifications and the finance team in reviewing each justification and preparing the report for the Assistant Director against the low value of the excess claw back amount the maintained schools representatives of the Schools Forum were asked to consider whether completing this exercise on an annual basis was still of benefit in terms of managing the levels of maintained schools surpluses balances.

In discussing the report Schools Forum noted the continuing pressures on school funding and how challenging this was for schools.



The maintained schools' School Forum representatives noted that maintained schools' balances projected net surplus position for 2023-24 of (£0.721m) and agreed that the excess surplus balances policy should continue to be applied in future years.

#### **10. High Needs Budget Monitoring – Quarter 1**

A report was presented that provided an update on the High Needs (HN) block deficit as at 1 June 2023 which was forecast to rise compared to the closing deficit at the end of the financial year 202-23.

A balanced High Needs budget had been set for 2023-24 with no planned transfer to or from reserves. The initial budget available for the HN Block was £35.881m based on the provisional HN block allocation from central government as confirmed in December 2022 with no transfers from the Schools Block. Since the initial budget was set the HN block allocation had been updated to reflect adjusted recoupment for HN places.

Performance against the High Needs Block budget was monitored monthly with reports presented to senior management, and to Executive on a quarterly basis, as well as to each Schools Forum meeting. The projection against the budget as at Q1 showed that the budget was projected to overspend by £1.380m as at 31 March 2024.

The key variances related to the EHCP top-up payments, the cost of independent specialist and other placements, residential placements, post-16 ISPs and top-ups, invest to save initiatives, special schools and individual non-material variances.

The pressure against the High Needs Block continued to be due to specific budget pressures relating to the growth in demand for Education Health Care Plans (EHCPs) for children and young people with SEN which continued to rise. The number of children with an EHCP as at Q1 was 2567; this figure was provisional pending the completion of the disaggregation of cases between the two new councils. Benchmarking showed Cumberland's percentage of pupils with EHCPs was higher compared to the national rate and to Cumbria's statistical neighbours. The rate of increase for Cumbria overall was matched by the rate of increase nationally and compared to Cumbria statistical neighbours.

In 2023-24 local authorities had seen an increase in their High Needs Block funding of at least 5% per head of population and additional High Needs funding to reflect likely cost increases for local authorities and schools of £1.585m resulting in total funding of £35.604m as at Q1. 29% of the total allocation was still based on historic 2017-18 actual spend and there had been no transfer of funding from the Schools Block to High Needs Block in 2023-24.

Cumbria were part of the Department for Education's Delivering Better Value for SEND programme and successfully applied and received approval for a £1m grant for each new authority to support their improvement plans the impact of which will be incorporated into Cumberland's DSG management plan in due course.

There followed a short discussion about re-establishing the SEND Working Group before the Cumberland Schools Forum noted the current projection on the HN Budget as at 1 June 2023.

#### **11. Delivering Better Value for SEND**

Earlier in the meeting it had been noted that written update on DBV would be presented at the November Schools Forum. Ahead of the written update, it was reported that work was ongoing on various workstreams and progress was being made with several priorities that had been identified including recruitment of teaching assistants, resourced provision (RP) with expressions of interest for RP having gone out to schools and further demand forecasting.

#### **12. School Teachers Review Body (STRB) Visit**

Each year colleagues from STRB visited a selection of schools across the country to have conversations with colleagues in schools which helped to inform recommendations to government. On 9 & 10 November this year they would be coming to Cumberland and would be visiting Caldew School (9 November, PM) and Stoneraise School (10 November, AM).

#### **13. Dates of Future Meetings**

- i) The next meeting of the full Schools Forum would be held on 2 November 2023, starting at 9.30am. It was likely to be held via Microsoft Teams; final arrangements would be circulated prior to the meeting.  
16 October 2023 had been scheduled for potential working group meetings. It had been agreed that this date would be used to deliver some training for Schools Forum members.
- ii) A proposed schedule of meeting dates for 2024 had been circulated with the agenda. Dates for 2024 to be finalised.

#### **14. Any Other Business**

- i) Fischer Family Trust (FFT) – The LA purchased a multi-use licence and were looking to assess the extent that schools used FFT. It was suggested that it would be worthwhile asking the question via CASH and PHA; David Grimshaw would raise with PHA.
- ii) Membership – There was a request for a full list of members of the Schools Forum to be shared in advance of the November meeting and efforts would be made to secure representation to any unfilled constituencies before that meeting.

E&S/NS  
September 2023



**CUMBERLAND COUNCIL SCHOOLS FORUM**

**Report Title:** School Funding Formula 2024-25

**Meeting date:** 2 November 2023

**Report of:** Dan Barton, Assistant Director, SEND, Education & Inclusion

**1.0 Executive Summary**

- 1.1 This paper presents the outcome of the Schools Forum consultation with all Cumberland schools and academies on the school funding formula for 2024/25.
- 1.2 On 17 July 2023 the Education & Skills Funding Agency (ESFA) announced details of the Dedicated Schools Grant (DSG) funding arrangements for 2024/25. These figures were amended on 6 October 2023 following the discovery of an error by ESFA relating to pupil numbers and affordability of the National Funding Formula (NFF). Following the update to the indicative funding figures published by the ESFA in October the information included in the consultation was updated and the consultation was extended slightly.
- 1.3 The Cumberland Schools Forum is asked to review the results of the consultation and make a recommendation to Executive on the formula that should be used in 2024/25 to allocate funding to schools and academies and the principles to apply if there is a shortfall or a balance remaining in the Schools Block after calculating the school budget shares.

**2.0 Link to Council Plan Priorities**

- 2.1 Ensuring that schools are funded appropriately is supportive of the Council Plan “to improve the health and wellbeing of its residents” and the priority to “address inequalities and enable its residents to access opportunities that will empower them to achieve their goals.”

**3.0 Recommendation**

- 3.1 Based on the consultation responses the Schools Forum is recommended to support Option 1 that:

- The NFF is implemented in Cumberland in full in 2024/25, impacting maintained schools from April 2024 and academies from September 2024 and;
- After taking into account the growth fund budget, any residual balance up to a maximum of 0.5% to be transferred from the Schools Block into the High Needs Block and;
- Any balance remaining in the Schools block after transfer of a maximum of 0.5% to be allocated to schools through the school funding formula and;
- If the NFF is not affordable, the basic per pupil factor values in the formula will be reduced.

#### **4.0 Rationale & Evidence for the Recommendation**

##### Background

- 4.1 A national funding formula was introduced for schools from 2018/19 and since then local authorities have been able to decide in consultation with their schools and Schools Forum whether to use the NFF to allocate funding to schools or to apply a locally determined schools funding formula, within some restrictive parameters set by the ESFA. In 2023/24 the DfE began the first year of transition towards a direct NFF whereby all schools (including academies) will be funded using one single NFF and placed further restrictions on local flexibility.
- 4.2 In 2023/24 the Executive members for Cumbria decided that the NFF would be used to allocate funding to schools and academies in Cumberland, as in previous years since the introduction of the NFF in 2018/19. When the final DSG Schools Block allocation for Cumberland was published by the ESFA in December 2022 and after applying the NFF in full and taking into account the Growth Fund budget of £0.343m there was an affordability gap of £0.519m resulting in a small reduction in the basic per pupil funding factor compared to the NFF value of -0.42%. As there was no balance remaining in the Schools Block after applying the funding formula on this basis there was no transfer to the High Needs Block to support the budget pressures in 2023/24.
- 4.3 On 17 July 2023 the ESFA announced details of the DSG funding arrangements for 2024/25. These were presented to Schools Forum at its meeting on 20 September 2023 who agreed with the local authority's recommendation to consult all Cumberland mainstream schools and academies on adopting the NFF in 2024/25 and to seek views on the principles to be applied if there is a shortfall or balance remaining in the Schools Block after allocating the funding on this basis, namely:
- if there a shortfall reduce the basic per pupil factor values;
  - If there is a balance remaining transfer up to 0.5% to the High Needs Block and allocate any leftover balance thereafter, to schools by increasing basic per pupil funding factor values in the formula.
- 4.4 The consultation opened on 25 September for a period of 3 weeks. However, subsequent to this, the ESFA announced on 6 October that it had made an error relating to pupils numbers and affordability of the NFF and published



revised provisional Schools Block DSG allocations for local authorities. The impact of the ESFA error was a reduction in the NFF factor values which were originally to increase by 2.4% after taking into account the roll in of the Mainstream Schools Additional Grant but the increase has now reduced to 1.4%.

- 4.5 The figures in the Schools Forum consultation with Cumberland schools and academies were revised and the deadline for responding was extended to Friday 20 October 2023, a copy of the revised consultation document is at Appendix 1 and the revised illustrative impact on schools is at Appendix 2.

#### Consultation Outcomes

- 4.6 In total 26 schools responded to the consultation with 23 (88%) agreeing with the Schools Forum recommendation that the NFF should be used to allocate funding to schools in 2024/25. A total of 17 (65%) agreed that if there was a shortfall in the Schools Block the basic per pupil factor values in the formula should be reduced. A total of 24 (92%) respondents agreed that a transfer from the Schools Block to the High Needs Block should be actioned if there is a balance remaining in the Schools Block.
- 4.7 A summary of the results and comments made by respondents are at Appendix 3. Although the number of schools responding to the consultation is low there is clear support for the proposals. Therefore, the Schools Forum is asked to consider the outcome of the consultation and recommend to Executive one of the below options.
- 4.8 The final decision on the school funding formula for 2024/25 will be made by Executive at its meeting on 12 December 2023.

### **5.0 Options**

- 5.1 Schools Forum can:

#### Option 1

- Recommend that the NFF is implemented in Cumberland in full in 2024/25, impacting maintained schools from April 2024 and academies from September 2024 and;
  - After taking into account the growth fund budget, any residual balance up to a maximum of 0.5% to be transferred from the Schools Block into the High Needs Block and;
  - Any balance remaining in the Schools block after transfer of a maximum of 0.5% to be allocated to schools through the school funding formula and;
  - If the NFF is not affordable, the basic per pupil factor values in the formula will be reduced.

Or:

#### Option 2

- Recommend that the NFF is implemented in Cumberland in full in 2024/25, impacting maintained schools from April 2024 and academies from September 2024 and;
  - Any balance remaining in the Schools block after taking into account the growth fund to be allocated through the school funding formula and;
  - If the NFF is not affordable, the basic per pupil factor values in the formula will be reduced.

5.2 It should be noted if Schools Forum recommend Option 2 there is a risk that, due to the requirement that local authorities to move their local formula closer to the NFF, 'topping up' the NFF factor values by allocating additional funding through the formula will create greater turbulence for some schools in future years. It may also make applying the NFF in full unaffordable in future years as the additional funding would be built into the schools budget share baselines, but the funding for this is not reflected in the notional school budgets used by the ESFA to calculate local authority level core NFF funding.

## 6.0 Financial & Other Relevant Implications

6.1 Financial implications are considered throughout this report. No equality/legal/ implications have been identified.

25 October 2023

---

### Appendices:

1. Cumberland School Funding Formula 2024/25 - Consultation Document
2. Cumberland School Funding Formula 2024/25 - Illustrative Impact of 2024/25 National Funding Formula
3. Cumberland Schools Funding Formula 2024/25 – Consultation Responses

### REPORT AUTHOR

Contact:

Name           Amanda Chew  
 Post title       Service Accountant  
 Email:           [amanda.chew@westmorlandandfurness.gov.uk](mailto:amanda.chew@westmorlandandfurness.gov.uk)



Westmorland  
& Furness  
Council

Working for Cumberland Council and  
Westmorland & Furness Council





## **School Funding Formula for 2024/25**

### **Consultation**

**Consultation between Cumberland Schools Forum and  
Maintained Schools & Academies within Cumberland**

**Consultation Commences: Monday 25 September 2023**

**Deadline for responding to the [consultation](#): Friday 20 October 2023**

## **Introduction**

### **National Funding Formula**

1. A national funding formula (NFF) was introduced for schools from 2018/19 and as in previous years, in 2024/25 local authorities will continue to decide, following consultation with their schools and Schools Forum, whether this formula is applied or a locally determined formula is used.
2. This document comprises a consultation with all Cumberland mainstream schools/academies and Schools Forum to seek views on the proposed changes to the schools funding formula in 2024/25. The consultation also considers some of the continuing challenges around high needs budget.
3. All schools are encouraged to respond to this consultation using the [online survey](#). The deadline for responding to the consultation is 20 October 2023. The outcome of the consultation will be reported to Schools Forum at their next meeting on 2 November who will, after taking into consideration the consultation results, make a recommendation to Executive members who will decide on the final shape of the school funding formula for 2024/25 in December 2023.
4. Schools can find further detailed information on the national funding formula at: [National funding formula for schools and high needs - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

### **Shape of the National Funding Formula in 2024/25**

5. In July 2023 the government announced that in 2024/25 the schools and high needs block funding would rise by £1.8bn nationally compared to 2023/24. Of this, £440m is being directed to the High Needs Block to support children and young people with special educational needs.
6. Local authorities will continue to have flexibility to set a local school funding formula in 2024/25 however the government continues to be committed to moving towards a 'hard' NFF whereby individual school budgets will be set directly by the ESFA rather than independently through a locally agreed funding formula. In 2023/24 local authorities were required to bring their own formulae at least 10% closer to the direct NFF. Local authorities whose factor values were within +/- 2.5% of the respective NFF values in 2023/24 are deemed to be mirroring the NFF and will only be allowed to set their 2024/25 local factor values between +/-2.5% of the NFF. This restriction is being applied again in 2024/25.
7. Changes in the 2024/25 NFF include the roll in of the Mainstream Schools Additional Grant (MSAG) of which £4,510 has been added to each school's lump sum factor and the remainder has been allocated on a per pupil basis as follows:

	£
Primary AWPU	119
KS3 AWPU	168
KS4 AWPU	190
Primary Minimum Per Pupil Funding	143
Secondary Minimum Per Pupil Funding	195
Primary FSM6	104
Secondary FSM6	152

8. On top of these increases, the basic per pupil funding factor, additional needs factors and the school lump sum have increased by 1.4%. The free school meals (FSM) factor will increase by 1.6% and the FSM6 factor has increased by 1.4%. The minimum per pupil funding levels (MPL) have been set at £4,610 per primary and £5,995 per secondary pupil.
9. A new split sites factor which targets extra funding to schools which operate across more than once site has been introduced into the NFF which must be used by local authorities in their local school funding formula. It comprises of a lump sum of £53,700 and for those schools whose sites are separated by more than 100 meters receive distance funding on a sliding scale up to a maximum of £26,900 for sites which are at least 500 metres away from the main site.
10. The settlement also allows for an increase to the funding floor so that all schools and academies will attract at least 0.5% per pupil gain against their 2023/24 per pupil baselines which have been adjusted to include the MSAG. Local authorities will continue to be allowed to set a minimum funding guarantee (MFG) in local formulae, which must be between +0% and +0.5%.
11. As in previous years, local authorities are allowed, with the agreement of their Schools Forum, to transfer up to 0.5% of the School Block funding to support the High Needs Block budget.
12. The below table shows a comparison between the formula factors applied in Cumberland in 2023/24 and the NFF in 2024/25:



sf 021123 School Funding Formula 2024-25 Consultation Outcome – Appendix 1

	2023-24	2024-25	Increase
	Unit Value	Unit Value	%
<b>Basic per Pupil Funding</b>			
Primary AWPU	£3,379	£3,562	5.42%
KS3 AWPU	£4,765	£5,022	5.39%
KS4 AWPU	£5,370	£5,661	5.42%
Primary Minimum Per Pupil Funding	£4,405	£4,610	4.65%
Secondary Minimum Per Pupil Funding	£5,715	£5,995	4.90%
<b>Deprivation</b>			
Primary FSM	£480	£490	2.08%
Secondary FSM	£480	£490	2.08%
Primary FSM6	£705	£820	16.31%
Secondary FSM6	£1,030	£1,200	16.50%
Primary IDACI A	£670	£680	1.49%
Primary IDACI B	£510	£515	0.98%
Primary IDACI C	£480	£485	1.04%
Primary IDACI D	£440	£445	1.14%
Primary IDACI E	£280	£285	1.79%
Primary IDACI F	£230	£235	2.17%
Secondary IDACI A	£930	£945	1.61%
Secondary IDACI B	£730	£740	1.37%
Secondary IDACI C	£680	£690	1.47%
Secondary IDACI D	£620	£630	1.61%
Secondary IDACI E	£445	£450	1.12%
Secondary IDACI F	£335	£340	1.49%
<b>Low Prior Attainment</b>			
Primary LPA	£1,155	£1,170	1.30%
Secondary LPA	£1,750	£1,775	1.43%
<b>English as an Additional Language</b>			
Primary EAL	£580	£590	1.72%
Secondary EAL	£1,565	£1,585	1.28%
<b>Mobility</b>			
Primary mobility	£945	£960	1.59%
Secondary mobility	£1,360	£1,380	1.47%
<b>School Led Funding</b>			
Lump Sum	£128,000	£134,400	5.00%
Primary Sparsity (Up to a maximum of)	£56,300	£57,100	1.42%
Secondary Sparsity (Up to a maximum of)	£81,900	£83,000	1.34%
New Split Site Factor (Up to a maximum of)	n/a	£80,600	
Rates & Rents	Actual cost	Actual cost	



**Cumberland Schools Funding Formula in 2023/24**

13. Following consultation with schools and Cumbria Schools Forum the school budget shares were calculated using the NFF in 2023/24 and it was recommended by Schools Forum and agreed by Cabinet members that if there was a leftover balance remaining after allocating the school budgets on this basis that up to 0.5% would transfer to the High Needs Block. When the DfE confirmed the final Schools Block funding for 2023/24 in December 2022, the school funding formula was calculated on the basis agreed and there was an affordability gap of £0.519m resulting in a small reduction in the basic per pupil funding factor compared to the NFF of -0.42%. As there was no balance remaining in the Schools Block after applying the funding formula on this basis there was no transfer to the High Needs Block to support the budget pressures in 2023/24.

**Cumberland Proposed School Funding Formula 2024/25**

14. The DfE have published notional 2024/25 budgets for each school based on the NFF using 2023/24 pupil data and characteristics. The notional budgets are available at: [National funding formula tables for schools and high needs: 2024 to 2025 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/national-funding-formula-tables-for-schools-and-high-needs-2024-to-2025).
15. The notional budgets, which are based on October 2022 pupil numbers and pupil characteristics, are then used by the ESFA to determine the actual primary and secondary per pupil funding units used to calculate the local authority level allocations for 2024/25. The ESFA calculate these units of funding by separately dividing each local authority's total primary and secondary funding through the NFF by its total primary and secondary pupil numbers. These units of funding form the core NFF funding and together with funding for Premises which is based on 2023/24 costs and Growth funding which also now includes funding for falling rolls comprise the total Schools Block allocation for 2024/25. The DfE have published the provisional Schools Block allocation for Cumberland which is compared to 2023/24 in the table below:

	23/24	24/25	Movement
	£m	£m	£m
Core NFF	195.729	206.869	11.140
Premises factor	2.322	2.594	0.272
Growth Fund factor	0.849	tbc	tbc
<b>Total</b>	<b>198.900</b>	<b>209.463</b>	<b>11.412</b>

16. The actual 2024/25 school funding formula allocations will be based on October 2023 pupil numbers and pupil characteristics. The Cumberland Schools Forum recommends that the NFF is used as the basis for allocating funding to schools in 2024/25 and that if, after applying the formula on this basis and taking into account any budget required to support growth needs there is shortfall or balance



remaining in the Schools Block funding then it is proposed that the following principles are applied:

- if there is shortfall reduce the basic per pupil funding factor values in the formula;
- if there is a remaining balance transfer up to 0.5% to the HN Block and allocate any leftover balance after that, if available, to schools by increasing basic per pupil funding factor values in the formula.

17. This would continue be the most prudent method of allocating the school budget shares in 2024/25 given that it is known that the government are moving forward with their plans to transition to a 'hard' formula in future years and that the majority of local authorities have either adopted the NFF or moved their own local formulae closer towards the NFF in preparation for this change. It will also provide schools with the full funding due to them under the NFF, subject to affordability.
18. A shortfall or balance remaining in the Schools Block funding can arise after allocating the funding to schools using the NFF due to the way local authorities are funded as detailed in paragraph 15. The actual primary and secondary units of funding at local authority level are based on October 2022 pupil data and changes in pupil characteristics such as eligibility for FSM or changes in attainment levels are not reflected in the primary and secondary units of funding used to allocate the core NFF funding to local authorities in 2024/25. It is anticipated that the number of children eligible for FSM will have increased between the October 2022 and 2023 census dates and therefore this could mean that applying the NFF in full will be unaffordable in 2024/25 as it was in 2023/24.
19. The Premises factor at local authority level, which is based on the previous year's actual spend in their 2023/24 school funding formula will also have an impact on affordability as 2024/25 school funding formula will be based on estimated premises costs for 2024/25.
20. The local authority level Growth Fund which, from 2024/25 also includes funding for falling rolls, is not ring-fenced and local authorities can decide on the level of growth/falling rolls budgets needed locally in consultation with Schools Forum. Historically, since the introduction of the NFF Cumbria has had Growth fund to support schools who have exceeded their PAN on the request of the local authority and this can also impact on the level of funding available to allocate through the school funding formula.
21. The alternative option would be not to transfer any leftover Schools Block funding to the HN Block but to allocate it, after applying the NFF, to schools through the school funding formula by 'topping up' the AWPU factor values but due to the new restrictions being imposed by government from 2023/24 any increases would be limited to +2.5%. However, it is not yet known how much funding will be available (if any) after applying the NFF as the final Schools Block funding, which will be based on the October 2023 census data, will not be made available until December 2023. Therefore, it is not possible to model the impact of this on individual school budgets with any degree of accuracy.



22. If any leftover Schools Block funding were to be allocated to schools through the schools funding formula by increasing the AWPU factor values above the level of the NFF values, not all schools would see an increase in their budget shares. This is because some schools receive protection through the MPL and MFG factors and therefore, unless the increase in APWU takes them over these levels of protection then they will see no change to their budget shares.
23. There is also a risk that, due to the proposal requiring local authorities to move their local formula closer to the NFF from 2024/25 onwards, 'topping up' the NFF factor values by allocating additional funding through the formula would create turbulence for some schools, although they would receive protection against year-on-year reductions through the MFG.
24. Appendix 1 to this consultation presents a comparison between the actual Cumberland school funding formula in 2023/24 against the proposed school funding formula for 2024/25. This mirrors the national funding formula as applied by the DfE and includes the mandatory MPL of £4,610 per primary and £5,995 per secondary pupil and a MFG of +0.5% per pupil increase against 2023/24 baselines.
25. The school level allocations do not exactly replicate the notional school budget shares as published by the DfE for all schools because the DfE have used the notional NFF baselines for 2023/24 to calculate the MFG for 2024/25 rather than the actual baselines for 2023/24 as submitted to the DfE through the Authority Proforma Tool (APT).
26. It is also important to note that the notional budgets published by the DfE are not reflective of actual amounts receivable by schools in 2024/25 as the local authority continues to have flexibility to set a locally agreed funding formula through consultation with schools and Schools Forum and it must also ensure that the final formula is affordable and does not exceed the School Block funding available.
27. The proposed school funding formula for 2024/25 will impact on maintained schools with effect from 1 April 2024 and for academies from 1 September 2024.
28. To enable a like for like comparison the illustrative 2024/25 school funding formula has been based on the same pupil numbers and pupil characteristic data as that used to calculate the actual 2023/24 school funding formula. The 2023/24 baseline school budget shares used to calculate the MFG have been adjusted to include the MSAG.
29. Final allocations for 2024/25 will be based on the December 2023 dataset which will use October 2023 census pupil data.
30. It should be noted that the actual school funding formula figures for 2023/24 and illustrative school funding formula figures for 2024/25 in Appendix 1 are shown before de-delegation has been deducted from maintained schools budgets and include premises factors (rates and rents) which have been based on 2023/24 actual levels for both maintained and academy schools as applied in the APT submitted to the DfE.

**Consultation Question 1:**

**Do you agree with your Schools Forum recommendation that the National Funding Formula continues to be used to allocate funding to schools in 2024/25?**

31. As recommended by your Schools Forum, if applying the national funding formula creates an affordability gap within the School Block it is proposed that the basic per pupil funding factor values are reduced down proportionately to a level that it is affordable. It should be noted that if this situation were to arise not all schools would see a reduction in their budget shares. This is because some schools receive protection funding through the MPL and MFG factors and are protected against losses through these factors.

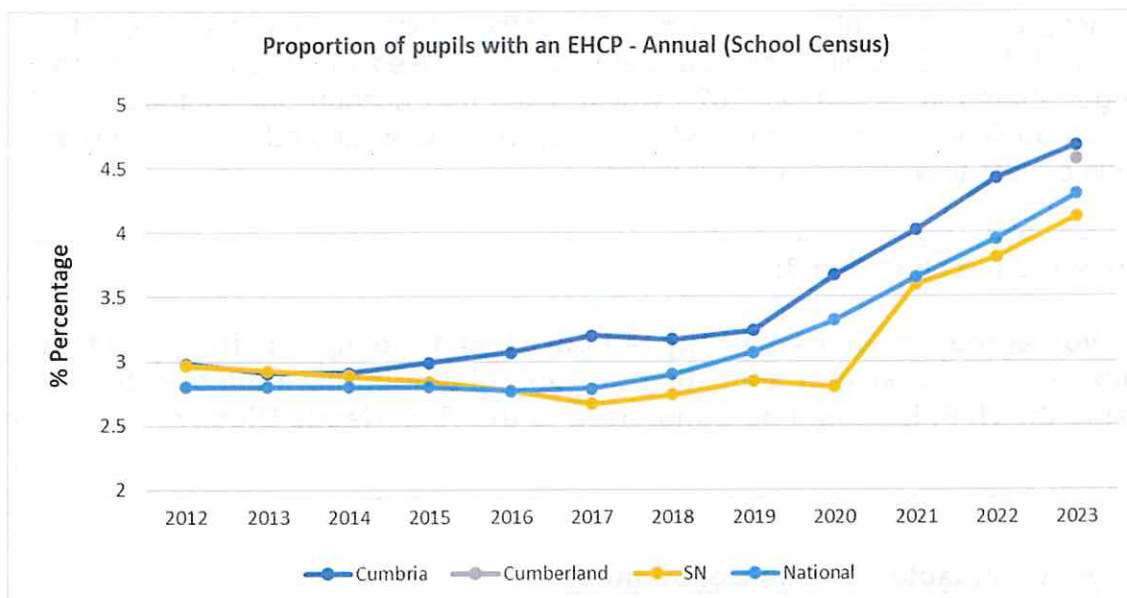
**Consultation Question 2:**

**Do you agree with your Schools Forum recommendation that if there is a shortfall in Schools Block funding after applying the National Funding Formula that this is managed by reducing the basic per pupil funding factor values in the formula?**

**High Needs Funding**

32. As previously published in last year's school funding formula consultation, schools will be aware, like many other local authorities, that Cumberland is experiencing significant budget challenges in relation to funding high needs provision.
33. The DfE requires all local authorities with a cumulative Dedicated Schools Grant (DSG) deficit to set out their plans to bring the reserves back to a balanced position. Following disaggregation the opening balance on the DSG reserves as at 1 April 2023 for Cumberland was a net deficit of £12.290m. The main pressure on the DSG reserves was the deficit on the HN Block of £16.595m this was offset by a surplus on other DSG blocks of (£4.305m). This figure does not include school balances which are reported on separately.
34. The deficit on the High Needs budget continues to relate to specific pressures relating to the growth in demand for Education Health Care Plans (EHCPs) for pupils with SEN which is directly linked to the SEND reforms of 2014, since which there has been a steep increase in the cumulative numbers of pupils with EHCPs over the last 7 years, which reflects the national picture with many other local authorities also experiencing significant pressure against the High Needs budget.
35. The benchmarking chart below shows that Cumberland's percentage of pupils with EHCPs is higher compared to the national and Cumbria statistical neighbours rates although the rate of increase for Cumbria overall is largely matched by the rate of increase both nationally and against the Cumbria statistical neighbours.





36. In July 2023 the DfE announced the provisional HN block funding allocation for 2024/25. This included a minimum increase per head of 2 to 18 year old population of 3% capped at 5% however this protection only applies to specific factors in the funding formula. For Cumberland the overall provisional increase in HN Block funding is estimated to be £1.018m (2.63% increase) compared to 2023/24 subject to changes in pupil numbers and other later adjustments.
37. Regular budget monitoring reports on the High Needs Block budget and progress against the deficit recovery plan are discussed at Schools Forum meetings. The minutes and reports are available to download from the [Schools Forum](#) page on the Cumberland website. However, despite the impact of a number of invest to save initiatives including early intervention initiatives, school based alternative provision programmes and expansion of special school places all of which over time are expected to reduce reliance on expensive independent providers and improve outcomes for children and young people with SEND, there is still a significant gap between funding available and forecast expenditure in 2023/24.
38. Cumberland is being supported by the DfE's Delivering Better Value for SEND programme the aim of which is to achieve a balanced in-year position on the High Needs Block and has successfully bid and received a £1m grant to support its improvement plans the outcomes of which will be incorporated into a new Cumberland DSG management plan in due course, however, the impact will not be achieved in the first year of the programme.
39. The funding regulations for 2023/24 allow a transfer of a maximum of 0.5% from the Schools Block to the High Needs Block with Schools Forum approval. Your Schools Forum recommends that after applying the NFF to calculate school budget shares, if there is any balance leftover it is transferred to the High Needs Block to support the budget pressures, capped at 0.5%. Any residual balance after transferring up to 0.5% to the High Needs Block would be allocated through the funding formula by increasing the basic per pupil unit factor value, subject to a maximum of +2.5% as detailed in paragraph 6 above.

40. It is not possible to confirm the actual value of the transfer to High Needs Block, if any, until the DfE publish the final data set to be used to calculate the school budget shares in December 2023 which takes into account the October 2023 census pupil data and characteristics. However it is estimated that up to 0.5% would equate to a maximum of £1.052m.

**Consultation Question 3:**

**Do you agree that, if there is any School Block funding remaining (up to a maximum of 0.5%) after allocating the school funding formula to schools using the NFF, it should be transferred to the High Needs Block?**

**Areas not impacted by this Consultation**

41. It should be noted that the following funding streams are not impacted by this consultation:
- Early Years Funding
  - Special School and Pupil Referral Units
  - Post 16 Education
  - Other government grants including Pupil Premium, Universal Infant Free School Meals, Primary Sport & PE grant.

**Responding to the Consultation**

24. Schools are invited to respond to the 3 questions in this consultation using the [online survey](#) by **Friday 20 October 2023**. Returns submitted after this date will not be included.
25. We encourage every school to respond. We kindly ask that there is only one response per school.

**Appendix:**

- 1) Illustrative Impact of National Funding Formula 2024/25



Cumberland School Funding Formula 2024/25 Consultation - Illustrative Impact of the 2024-25 National Funding Formula v2

LA/ESTAB	School Name	2023-24 Pupil numbers used as per APT submission.  *(Note for some academies this may differ from the GAG data)	2023-24 Actual NFF Allocations per APT submission before delegation (maintained schools) and including premises factors  *(For academies this will differ from the GAG data)		Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant	2024-25 Indicative NFF allocations using 2023-24 pupil numbers and data after Minimum Funding Guarantee and before delegation (maintained schools) including premises factors		Year on Year change  Increase  (h) [(a)-(f)]	(h) [(e)/(f)-1]	Calculation of Minimum Funding Guarantee		
			(d)	(e)			(f) [(d)+(e)]	(g)			(h) [(g)-(f)]	(i) [(h)/(g)-1]	(m) [(i)/(h)-1]
9422001	Allonby Primary School	34,731	198,556,925	6,747,452	205,304,377	208,621,259	3,316,882	27,407,510	2023-24 Post MFG per pupil	2024-25 Post MFG per pupil	MFG % change		
9422008	Bewcastle School	18	268,331	7,380,000	8,648,331	8,648,331	0	194,360,300	£4,519.50	£4,749.04	5.08%		
9422010	Blennerhasset School	13	240,404	6,265,000	6,505,404	6,505,404	0	194,610,800	£4,004.45	£4,284.98	7.01%		
9422014	Burgh by Sands School	62	420,007	£12,200,000	£12,620,007	£12,620,007	0	193,777,000	£3,845.64	£3,958.61	2.94%		
9422019	Cummersdale School	99	541,113	£17,019,000	£17,560,113	£17,560,113	0	183,915,870	£3,779.96	£3,872.21	2.44%		
9422020	Cumwhinton School	102	528,486	£18,104,000	£18,632,486	£18,632,486	0	146,694,500	£3,920.55	£4,007.90	2.23%		
9422027	Great Orton Primary School	193	880,756	£28,621,000	£29,501,756	£29,501,756	0	150,030,560	£3,934.44	£4,013.47	2.01%		
9422032	Holme St Cuthbert School	33	328,161	£9,105,000	£9,433,161	£9,433,161	0	198,229,380	£4,794.35	£4,970.47	3.67%		
9422033	Irthington Village School	29	314,811	£9,269,000	£9,583,811	£9,583,811	0	193,686,700	£3,890.72	£4,043.04	3.91%		
9422035	Kirkbride Primary School	58	416,864	£11,932,000	£12,348,864	£12,348,864	0	197,091,100	£3,994.92	£4,112.09	2.93%		
9422059	Stoneraise School	69	463,047	£13,449,000	£13,912,047	£13,912,047	0	202,163,750	£3,975.83	£4,085.25	2.75%		
9422060	Thursby Primary School	149	754,296	£24,737,000	£25,491,296	£25,491,296	0	148,433,130	£4,232.21	£4,318.94	2.05%		
9422069	Thomlinson Junior School	104	571,830	£18,238,000	£18,809,830	£18,809,830	0	178,347,620	£3,958.85	£4,051.80	2.35%		
9422071	Wigton Infant School	233	1,095,531	£35,461,000	£36,556,531	£36,556,531	0	152,213,500	£4,200.77	£4,282.29	1.94%		
9422072	Wigton Infant School	162	808,728	£25,660,000	£26,468,728	£26,468,728	0	152,287,000	£4,207.08	£4,292.36	2.05%		
9422103	Broughton Moor Primary School	156	793,157	£27,546,000	£28,339,157	£28,339,157	0	152,287,000	£4,284.72	£4,372.65	2.05%		
9422117	Grasslot Infant School	55	378,624	£11,783,000	£12,161,624	£12,161,624	0	167,287,700	£4,056.71	£4,171.73	2.84%		
9422126	Ewanning Junior School	46	335,285	£11,232,000	£11,567,285	£11,567,285	0	140,934,500	£4,734.70	£4,851.73	2.47%		
9422143	St Michael's Nursery and Infant School	47	342,015	£11,143,000	£11,485,015	£11,485,015	0	150,332,250	£5,076.48	£5,177.53	1.99%		
9422144	Victoria Infant and Nursery School	208	1,103,115	£36,334,000	£37,437,115	£37,437,115	0	141,048,750	£4,466.69	£4,584.98	2.65%		
9422147	Ashfield Infant & Nursery School	260	1,388,125	£47,930,000	£49,318,125	£49,318,125	0	153,091,750	£4,742.10	£4,831.91	1.89%		
9422148	Ashfield Junior School	177	863,354	£28,277,000	£29,140,354	£29,140,354	0	166,078,000	£4,884.53	£4,974.90	1.85%		
9422201	Bookwell Primary School	256	1,223,677	£41,110,000	£42,333,677	£42,333,677	0	153,126,100	£4,172.34	£4,255.64	2.00%		
9422202	Frinton Community Primary School	208	971,133	£32,798,000	£33,769,133	£33,769,133	0	152,465,000	£4,345.01	£4,427.50	1.90%		
9422214	Haverling Primary School	134	686,738	£23,056,000	£23,742,738	£23,742,738	0	147,070,750	£4,119.52	£4,200.99	1.98%		
9422216	Lowca Community School	161	788,890	£26,061,000	£26,849,890	£26,849,890	0	149,038,100	£4,184.74	£4,272.47	2.10%		
9422219	Millom Infant School	57	403,336	£12,541,000	£12,944,336	£12,944,336	0	146,945,000	£4,149.10	£4,233.76	2.04%		
9422220	Moor Row Community Primary School	76	467,447	£16,154,000	£16,621,447	£16,621,447	0	136,909,000	£4,894.18	£4,918.65	0.50%		
9422222	Moor Row Community Primary School	110	629,266	£21,760,000	£22,389,266	£22,389,266	0	141,550,750	£4,500.66	£4,604.54	2.31%		
9422223	Moresby Primary School	71	474,724	£14,415,000	£14,889,724	£14,889,724	0	145,941,000	£4,591.68	£4,689.25	2.12%		
9422224	Seascale Primary School	105	559,980	£17,837,000	£18,396,980	£18,396,980	0	193,377,500	£4,165.66	£4,275.77	2.64%		
9422225	St Bees Village Primary School	161	762,114	£25,125,000	£25,887,114	£25,887,114	0	153,457,550	£4,041.52	£4,132.46	2.25%		
9422227	Thwaites School	43	365,790	£10,459,000	£10,824,790	£10,824,790	0	125,282,870	£4,004.18	£4,096.29	2.30%		
9422228	Bransty Primary School	207	994,575	£33,823,000	£34,817,575	£34,817,575	0	199,090,750	£4,119.98	£4,256.22	3.31%		
								150,081,750	£4,243.07	£4,326.61	1.97%		



LAESTAB	(a)	(b)	(c)	2023-24 Actual NFF Allocations per APT submission before de-delegation (maintained schools) and including premises factors *(For academies this will differ from the GAG data)	Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant	2024-25 Indicative NFF allocations using numbers and data after Minimum Funding Guarantee and before de-delegation (maintained schools) including premises factors	Increase	(h) [(e)-(f)]	(i) [(e)/(f)-1]	Year on Year change	2024-25 Lump sum, sparsity and premises factors to be excluded from the MFG Baseline	(k) [(f)-(i)/(c)]	2023-24 Post MFG per pupil	(l) [(h)-(i)/(c)]	2024-25 Post MFG per pupil	MFG % change
9422230	Kells Infant School		84	515,307	£17,210.00	£52,517.31	£541,185.84	£8,668.59	£10,913.12	1.65%	£146,206.50	£4,598.94	£4,702.14	2.24%			
9422231	Monkway Junior School		107	643,090	£22,131.00	£65,221.14	£676,134.26	£10,913.12	£23,508.00	1.64%	£147,195.50	£4,841.36	£4,943.35	2.11%			
9422237	Jericho Primary School		379	1,700,846	£54,187.00	£1,755,033.00	£1,778,541.00	£23,508.00	£21,623.07	1.34%	£165,751.00	£4,193.36	£4,255.38	1.48%			
9422606	Inglewood Junior School		251	1,259,141	£43,323.00	£1,302,463.90	£1,324,086.97	£21,623.07	£15,249.64	1.66%	£154,477.00	£4,573.67	£4,659.82	1.88%			
9422607	Inglewood Infant School		165	902,752	£31,217.00	£933,968.71	£949,218.35	£15,249.64	£22,951.59	1.63%	£156,228.50	£4,806.00	£4,892.28	1.96%			
9422609	Norman Street Primary School		326	1,459,527	£49,856.00	£1,509,383.09	£1,532,334.69	£22,951.59	£13,233.93	1.57%	£152,475.00	£4,162.29	£4,232.70	1.69%			
9422610	Petteril Bank School		130	801,162	£28,404.00	£829,566.31	£842,999.91	£13,233.93	£19,155.05	1.60%	£155,732.25	£5,183.34	£5,285.14	1.96%			
9422618	Newlalthes Junior School		238	1,108,283	£36,472.00	£1,144,755.19	£1,163,910.24	£19,155.05	£14,962.34	1.67%	£152,465.00	£4,169.29	£4,249.77	1.93%			
9422620	Belle Vue Primary School		179	874,493	£28,515.00	£903,008.28	£917,970.62	£14,962.34	£25,240.00	1.66%	£151,708.50	£4,197.21	£4,280.79	1.99%			
9422622	Kingmoor Junior School		433	1,941,876	£63,525.00	£2,005,401.00	£2,030,641.00	£25,240.00	£17,698.14	1.25%	£168,911.00	£4,241.32	£4,299.61	1.37%			
9422623	Kingmoor Junior School		328	1,469,680	£48,222.00	£1,517,901.50	£1,536,919.50	£19,018.00	£17,889.69	1.25%	£159,239.50	£4,142.26	£4,200.24	1.40%			
9422625	Kingmoor Nursery and Infant School		222	1,025,379	£34,048.00	£1,059,427.04	£1,077,125.18	£17,698.14	£12,957.46	1.67%	£161,185.00	£4,046.14	£4,125.86	1.97%			
9422626	Brook Street Primary School		190	1,045,484	£33,152.00	£1,078,635.70	£1,096,525.39	£17,889.69	£5,749.59	1.66%	£155,852.25	£4,856.75	£4,950.91	1.94%			
9422703	Silloth Primary School		156	775,833	£26,298.00	£802,130.97	£815,088.44	£12,957.46	£37,849.59	1.62%	£153,343.25	£4,158.90	£4,241.96	2.00%			
9422706	Fellview Primary School		45	566,847	£10,073.00	£368,920.15	£374,569.68	£5,749.59	£9,378.49	1.60%	£198,522.75	£3,786.61	£3,914.38	3.73%			
9422707	Derwent Vale Primary and Nursery School		82	566,698	£17,804.00	£584,501.63	£593,880.13	£9,378.49	£33,070.07	1.69%	£200,844.57	£4,678.74	£4,793.12	2.44%			
9422710	Robert Ferguson Primary School		399	1,892,169	£63,847.00	£1,956,016.49	£1,989,086.57	£33,070.07	£28,886.02	1.69%	£169,684.00	£4,477.02	£4,559.91	1.85%			
9422711	Upperby Primary School		341	1,682,256	£57,153.00	£1,739,409.26	£1,768,295.28	£28,886.02	£12,421.86	1.66%	£175,092.00	£4,587.44	£4,672.15	1.85%			
9422713	Pennine Way Primary School		509	2,469,769	£82,761.00	£2,552,529.98	£2,594,902.01	£42,372.03	£17,216.35	1.68%	£192,055.00	£4,637.48	£4,720.72	1.80%			
9422714	Orgill Primary School		221	1,121,207	£39,025.00	£1,160,232.01	£1,179,454.40	£19,222.39	£14,461.96	1.68%	£156,531.25	£4,541.63	£4,628.61	1.92%			
9422716	Montreal CofE Primary School		128	739,497	£25,566.00	£765,062.96	£777,484.82	£12,421.86	£10,589.90	1.67%	£152,785.00	£4,783.44	£4,880.48	2.03%			
9422717	St Patrick's Catholic Primary School		255	1,247,903	£43,487.00	£1,291,390.83	£1,313,284.84	£21,895.01	£17,698.14	1.70%	£140,169.40	£4,514.59	£4,600.45	1.90%			
9422718	Distington Community School		103	628,691	£21,239.00	£649,929.79	£660,519.69	£10,589.90	£17,216.35	1.63%	£175,529.70	£4,605.83	£4,708.64	2.23%			
9422720	Westfield Nursery and Primary School		145	848,236	£31,125.00	£879,361.47	£893,823.43	£14,461.96	£7,953.84	1.64%	£148,701.50	£5,039.03	£5,138.77	1.98%			
9422721	The Bishop Harvey Goodwin School (Church of England Voluntary Aided)		182	989,708	£36,256.00	£1,025,963.63	£1,043,179.98	£17,216.35	£10,383.86	1.68%	£140,014.80	£4,867.85	£4,962.45	1.94%			
9423002	Boltons CofE School		78	478,607	£14,104.00	£492,710.54	£500,664.38	£7,953.84	£16,472.87	1.61%	£197,416.22	£3,785.82	£3,887.80	2.69%			
9423007	St Michael's CofE Primary School		204	955,848	£30,554.00	£986,402.12	£1,002,874.98	£16,472.87	£6,659.32	1.67%	£151,963.00	£4,090.39	£4,171.14	1.97%			
9423014	Holm Cultram Abbey CofE School		54	408,206	£12,288.00	£420,493.52	£427,152.84	£6,659.32	£7,404.89	1.58%	£195,313.40	£4,170.00	£4,293.32	2.96%			
9423015	Houghton CofE School		194	870,188	£28,948.00	£899,135.89	£909,519.75	£10,383.86	£11,574.19	1.58%	£149,579.75	£3,863.69	£3,917.22	1.39%			
9423017	Ireby CofE School		25	279,727	£7,485.00	£287,211.58	£291,534.83	£4,323.25	£15,749.07	1.51%	£195,896.83	£3,652.59	£3,752.52	4.73%			
9423018	Kirkhampton CofE School		94	537,757	£16,424.00	£554,181.06	£563,711.13	£9,378.49	£9,300.06	1.63%	£184,466.12	£3,933.14	£4,029.20	2.44%			
9423020	Lancroft CofE Primary School		68	453,524	£12,602.00	£466,126.46	£473,531.34	£7,404.89	£4,000.51	1.59%	£200,794.25	£3,901.94	£4,010.84	2.79%			
9423023	Walton & Lees Hill CofE School		16	261,300	£6,830.00	£268,130.09	£272,130.60	£4,000.51	£5,677.47	1.49%	£194,410.20	£4,607.49	£4,733.53	5.43%			
9423030	Raughton Head CofE School & Nursery		45	349,688	£9,969.00	£359,657.20	£365,334.67	£5,677.47	£10,808.20	1.58%	£195,865.30	£3,639.82	£3,765.99	3.47%			
9423031	Rockcliffe CofE School		129	631,639	£20,900.00	£652,539.61	£663,347.81	£10,808.20	£5,346.27	1.66%	£164,924.38	£3,779.96	£3,863.75	2.22%			
9423101	St Bridget's CofE School		143	659,711	£21,631.00	£681,342.24	£692,916.48	£11,574.19	£17,649.07	1.70%	£141,361.38	£3,776.09	£3,857.03	2.14%			
9423100	Bridekirk Dovenby CofE Primary School		76	463,251	£14,386.00	£477,636.61	£485,285.68	£7,404.89	£16,240.81	1.66%	£170,684.64	£4,038.84	£4,139.49	2.49%			
9423102	All Saints' CofE School		185	946,918	£30,789.00	£977,706.56	£993,947.36	£16,240.81	£6,073.15	1.66%	£155,990.00	£4,441.71	£4,529.50	1.98%			
9423103	Crosscanobry St John's CofE School		44	378,719	£10,994.00	£389,713.21	£395,786.36	£6,073.15	£19,953.51	1.58%	£196,768.50	£4,385.11	£4,523.13	3.15%			
9423112	Maryport CofE Primary School		250	1,155,552	£38,108.00	£1,193,660.26	£1,213,613.78	£19,953.51	£6,525.01	1.59%	£155,224.75	£4,153.74	£4,201.75	1.92%			
9423114	Plumland CofE School		55	398,321	£11,679.00	£410,000.15	£416,525.16	£6,525.01	£6,068.02	1.62%	£195,328.80	£3,903.12	£4,021.75	3.04%			
9423116	Seaton St. Paul's CofE Junior School		207	949,928	£32,783.00	£982,710.74	£988,778.76	£6,068.02	£4,454.50	1.54%	£151,712.50	£4,014.48	£4,043.80	0.73%			
9423200	Captain Shaw's CofE School		25	282,102	£8,005.00	£290,106.65	£294,561.15	£4,454.50			£193,133.65	£3,878.92	£4,057.10	4.59%			

LAESTAB	(a)	(b)	(c)	2023-24 Actual NFF Allocations per APT submission before de-delegation (maintained schools) and including premises factors *(For academies this will differ from the GAG data)	Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant	2024-25 Indicative NFF allocations using numbers and data after Minimum Funding Guarantee and before de-delegation (maintained schools) including premises factors	Increase	(h) [(e)-(f)]	(i) [(e)/(f)-1]	Year on Year change	2024-25 Lump sum, sparsity and premises factors to be excluded from the MFG Baseline	(k) [(f)-(i)/(c)]	2023-24 Post MFG per pupil	(l) [(h)-(i)/(c)]	2024-25 Post MFG per pupil	MFG % change
9422230	Kells Infant School		84	515,307	£17,210.00	£52,517.31	£541,185.84	£8,668.59	£10,913.12	1.65%	£146,206.50	£4,598.94	£4,702.14	2.24%			
9422231	Monkway Junior School		107	643,090	£22,131.00	£65,221.14	£676,134.26	£10,913.12	£23,508.00	1.64%	£147,195.50	£4,841.36	£4,943.35	2.11%			
9422237	Jericho Primary School		379	1,700,846	£54,187.00	£1,755,033.00	£1,778,541.00	£23,508.00	£21,623.07	1.34%	£165,751.00	£4,193.36	£4,255.38	1.48%			
9422606	Inglewood Junior School		251	1,259,141	£43,323.00	£1,302,463.90	£1,324,086.97	£21,623.07	£15,249.64	1.66%	£154,477.00	£4,573.67	£4,659.82	1.88%			
9422607	Inglewood Infant School		165	902,752	£31,217.00	£933,968.71	£949,218.35	£15,249.64	£22,951.59	1.63%	£156,228.50	£4,806.00	£4,892.28	1.96%			
9422609	Norman Street Primary School		326	1,459,527	£49,856.00	£1,509,383.09	£1,532,334.69	£22,951.59	£13,233.93	1.57%	£152,475.00	£4,162.29	£4,232.70	1.69%			
9422610	Petteril Bank School		130	801,162	£28,404.00	£829,566.31	£842,999.91	£13,233.93	£19,155.05	1.60%	£155,732.25	£5,183.34	£5,285.14	1.96%			
9422618	Newlalthes Junior School		238	1,108,283	£36,472.00	£1,144,755.19	£1,163,910.24	£19,155.05	£14,962.34	1.67%	£152,465.00	£4,169.29	£4,249.77	1.93%			
9422620	Belle Vue Primary School		179	874,493	£28,515.00	£903,008.28	£917,970.62	£14,962.34	£25,240.00	1.66%	£151,708.50	£4,197.21	£4,280.79	1.99%			
9422622	Kingmoor Junior School		433	1,941,876	£63,525.00	£2,005,401.00	£2,030,641.00	£25,240.00	£17,698.14	1.25%	£168,911.00	£4,241.32	£4,299.61	1.37%			
9422623	Kingmoor Junior School		328	1,469,680	£48,222.00	£1,517,901.50	£1,536,919.50	£19,018.00	£17,889.69	1.25%	£159,239.50	£4,142.26	£4,200.24	1.40%			
9422625	Kingmoor Nursery and Infant School		222	1,025,379	£34,048.00	£1,059,427.04	£1,077,125.18	£17,698.14	£12,957.46	1.67%	£161,185.00	£4,046.14	£4,125.86	1.97%			
9422626	Brook Street Primary School		190	1,045,484	£33,152.00	£1,078,635.70	£1,096,525.39	£17,889.69	£5,749.59	1.66%	£155,852.25	£4,856.75	£4,950.91	1.94%			
9422703	Silloth Primary School		156	775,833	£26,298.00	£802,130.97	£815,088.44	£12,957.46	£37,849.59	1.62%	£153,343.25	£4,158.90	£4,241.96	2.00%			
9422706	Fellview Primary School		45	566,847	£10,073.00	£368,920.15	£374,569.68	£5,749.59	£9,378.49	1.60%	£198,522.75	£3,786.61	£3,914.38	3.73%			
9422707	Derwent Vale Primary and Nursery School		82	566,698	£17,804.00	£584,501.63	£593,880.13	£9,378.49	£33,070.07	1.69%	£200,844.57	£4,678.74	£4,793.12	2.44%			
9422710	Robert Ferguson Primary School		399	1,892,169	£63,847.00	£1,956,016.49	£1,989,086.57	£33,070.07									



School Name	2023-24 Pupil numbers used as per APT submission.	2023-24 Actual NFF Allocations per APT submission before de-delegation (maintained schools) and premises factors including this will differ from the GAG data)	Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant	Indicative NFF allocations using numbers and data after Minimum Funding Guarantee and before de-delegation (maintained schools) including premises factors	Increase	Year on Year change	2024-25 Lump sum, sparsity and premises factors to be excluded from the MFG Baseline	2023-24 Post MFG per pupil	2024-25 Post MFG per pupil	MFG % change
9423204 Emmerdale and Kinniside CofE Primary School	54	391,412	£11,248.00	£402,660.50	£409,085.80	£6,425.30	1.60%	£193,607.80	£3,871.35	£3,990.33	3.07%
9423206 Gosforth CofE Primary School	115	584,501	£18,819.00	£603,320.11	£613,246.10	£9,925.99	1.65%	£175,146.77	£3,723.25	£3,809.56	2.32%
9423209 St Bridget's CofE School	65	424,849	£14,533.00	£439,382.38	£446,506.50	£7,124.12	1.62%	£140,010.25	£4,605.73	£4,715.33	2.36%
9423210 St James' CofE Infant and Nursery School	107	568,875	£18,595.00	£587,470.36	£597,152.29	£9,681.94	1.65%	£144,938.00	£4,135.82	£4,226.30	2.19%
9423211 St James' CofE Junior School	159	759,343	£25,511.00	£784,854.04	£798,032.35	£13,178.31	1.68%	£146,819.25	£4,012.80	£4,095.68	2.07%
9423301 Blackford CofE Primary School	45	379,837	£10,905.00	£390,741.91	£396,885.19	£6,143.28	1.57%	£192,519.76	£4,404.94	£4,541.45	3.10%
9423316 Rosley CofE School	61	425,216	£11,769.00	£436,985.02	£443,974.72	£6,989.69	1.60%	£192,530.00	£4,007.46	£4,122.04	2.86%
9423322 St Matthew's CofE School	56	398,899	£11,174.00	£410,072.80	£416,632.98	£6,560.18	1.60%	£192,055.96	£3,893.16	£4,010.30	3.01%
9423324 Wiggonby CofE School	54	385,873	£11,144.00	£397,016.87	£403,374.31	£6,357.44	1.60%	£192,026.72	£3,792.78	£3,910.51	3.10%
9423328 St Cuthbert's Catholic Primary School	95	537,490	£19,247.00	£556,737.45	£565,982.49	£9,245.04	1.66%	£137,619.00	£4,411.77	£4,509.09	2.21%
9423400 St Michael's CofE Primary School	45	376,576	£10,905.00	£387,480.55	£393,633.85	£6,133.30	1.58%	£192,659.00	£4,329.37	£4,465.66	3.15%
9423401 Borrowdale CofE Primary School	26	302,812	£8,644.00	£311,456.27	£316,234.35	£4,778.08	1.53%	£192,354.95	£4,580.82	£4,764.59	4.01%
9423414 St Mary's Catholic Primary School	162	902,915	£31,588.00	£934,502.83	£949,838.01	£15,335.18	1.64%	£136,230.80	£4,927.61	£5,022.27	1.92%
9423416 St Patrick's Catholic Primary School	202	1,002,262	£33,436.00	£1,035,697.80	£1,053,120.56	£17,422.76	1.68%	£138,340.80	£4,442.36	£4,528.61	1.94%
9423500 Beckermat CofE School	75	477,452	£13,747.00	£491,199.28	£499,168.34	£7,969.07	1.62%	£192,814.97	£3,978.46	£4,084.71	2.67%
9423506 St Bridget's Catholic Primary School	166	842,104	£28,736.00	£870,840.40	£885,489.38	£14,648.98	1.68%	£137,413.20	£4,418.24	£4,506.48	2.00%
9423508 St Bega's CofE Primary School	19	260,067	£7,187.00	£267,254.17	£271,318.23	£4,064.06	1.52%	£192,087.68	£3,956.13	£4,170.03	5.41%
9423510 St Joseph's Catholic Primary School	45	321,436	£11,217.00	£332,653.41	£338,042.20	£5,388.78	1.62%	£134,689.80	£4,398.97	£4,518.72	2.72%
9423516 Wabberthwaite CofE School	180	899,712	£29,570.00	£929,282.11	£945,023.80	£15,741.70	1.69%	£192,459.65	£4,402.18	£4,489.63	1.99%
9423519 St Mary's Catholic Primary School	51	378,380	£10,995.00	£389,375.42	£395,586.20	£6,210.78	1.60%	£192,459.65	£3,861.09	£3,982.87	3.15%
9423520 St Begh's Catholic Junior School	241	1,176,285	£42,445.00	£1,218,730.29	£1,239,444.26	£20,713.97	1.70%	£137,825.80	£4,440.18	£4,529.26	2.01%
9423521 St Gregory and St Patrick's Catholic Infant School	181	897,869	£31,041.00	£928,909.92	£944,600.14	£15,690.22	1.69%	£139,138.40	£4,363.38	£4,450.06	1.99%
9423652 St Bede's Catholic Primary School	203	1,067,198	£34,907.00	£1,102,104.71	£1,120,334.36	£18,229.65	1.65%	£137,799.20	£4,750.27	£4,840.07	1.89%
9423661 Valley Primary School and Nursery	242	1,324,033	£43,500.00	£1,367,533.04	£1,389,926.07	£22,393.02	1.64%	£159,034.07	£3,707.66	£3,792.17	2.28%
9423662 Beckstone Primary School	308	1,421,237	£45,946.00	£1,467,182.58	£1,491,563.22	£24,380.64	1.66%	£165,048.00	£4,227.71	£4,306.87	1.87%
9423663 St Herbert's CofE (VA) Primary and Nursery School	258	1,147,341	£37,084.00	£1,184,425.05	£1,195,046.00	£10,620.95	0.90%	£140,066.00	£4,047.90	£4,089.07	1.02%
9423700 Hayton CofE Primary School	121	588,336	£19,325.00	£607,660.65	£617,886.62	£10,225.97	1.68%	£138,907.00	£4,032.98	£4,111.29	1.94%
9425201 Scotby CofE Primary School	246	1,094,637	£36,384.00	£1,131,020.82	£1,150,283.94	£19,263.13	1.70%	£153,141.08	£4,040.99	£4,128.32	2.16%
9425202 Warwick Bridge Primary School	129	652,903	£21,525.00	£674,428.31	£685,694.36	£11,266.05	1.67%	£141,199.40	£4,375.11	£4,462.00	1.99%
9425203 Brampton Primary School	183	909,734	£32,111.00	£941,845.24	£957,744.52	£15,899.29	1.69%	£192,607.80	£4,033.65	£4,170.71	3.40%
9425212 Bowness-on-Solway Primary School	41	348,078	£9,909.00	£357,987.37	£363,607.07	£5,619.70	1.57%	£192,607.80	£4,033.65	£4,170.71	3.40%
9425215 Hallbankgate Village School	55	410,622	£12,095.00	£422,716.80	£429,469.14	£6,752.34	1.60%	£192,607.80	£4,033.65	£4,170.71	3.40%
9425218 Fir Ends Primary School	95	536,943	£16,127.00	£553,070.43	£562,159.67	£9,089.24	1.64%	£178,275.77	£3,945.21	£4,040.88	2.45%
9425226 Oughterside Primary School	54	419,253	£13,640.00	£432,893.38	£439,829.51	£6,936.13	1.60%	£192,220.80	£4,456.90	£4,585.35	2.88%
9424001 Beacon Hill Community School	151	1,252,851	£37,820.00	£1,290,671.33	£1,295,880.59	£5,209.26	0.40%	£247,091.00	£6,899.68	£6,934.18	0.50%
9424008 Solway Community School	136	1,102,065	£36,080.00	£1,138,145.28	£1,156,672.71	£18,527.44	1.63%	£247,091.00	£6,551.87	£6,688.10	2.08%
9424104 Netherhall School	717	4,710,517	£173,350.00	£4,883,867.49	£4,967,316.84	£83,449.34	1.71%	£234,766.07	£6,484.10	£6,600.49	1.79%
9424204 Millom School	471	3,032,598	£103,408.00	£3,136,006.23	£3,189,121.18	£53,114.94	1.69%	£291,743.00	£6,135.69	£6,248.46	1.84%
9424501 The Nelson Thomlinson School	1,010	6,008,606	£204,968.00	£6,213,573.64	£6,320,326.15	£106,752.51	1.72%	£246,915.00	£5,863.20	£5,968.89	1.80%
9424622 St Benedict's Catholic High School	920	5,728,457	£205,552.00	£5,934,008.67	£6,037,257.86	£103,249.19	1.74%	£173,547.00	£6,261.37	£6,373.60	1.79%
9424630 St John Henry Newman Catholic School	601	3,923,698	£140,052.00	£4,063,749.79	£4,133,868.98	£70,119.20	1.73%	£139,776.00	£4,155.73	£4,235.62	1.92%
9422006 Yewdale School	271	1,222,875	£43,103.00	£1,265,977.92	£1,287,629.48	£21,651.55	1.71%	£138,803.20	£4,205.95	£4,290.57	2.01%
9422007 Longtown Primary School	173	836,344	£30,089.00	£866,432.78	£881,071.91	£14,639.13	1.69%	£138,803.20	£4,205.95	£4,290.57	2.01%



2024-25 Lump sum, sparsity and premises factors to be excluded from the MFG Baseline	2023-24 Post MFG per pupil	2024-25 Post MFG per pupil	MFG % change
(i)	(k) ((f)-(i)) / (c)	(l) ((e)-(i)) / (c)	(m) ((l)-(k)) / (k)-1
£135,808.00	£5,450.29	£5,571.52	2.22%
£193,605.42	£3,955.45	£4,054.74	2.51%
£146,443.25	£5,006.34	£5,099.24	1.86%
£137,651.20	£4,467.16	£4,560.01	2.08%
£137,318.00	£5,317.82	£5,423.67	1.99%
£180,563.40	£3,679.87	£3,773.70	2.55%
£195,392.20	£9,686.19	£9,857.42	4.65%
£191,950.56	£9,986.39	£4,157.75	4.30%
£140,236.80	£4,204.40	£4,270.61	1.57%
£192,882.40	£9,884.28	£4,009.60	3.23%
£140,648.42	£5,319.55	£5,346.15	0.50%
£137,548.80	£4,051.06	£4,133.84	2.04%
£135,449.60	£4,236.29	£4,257.47	0.50%
£141,150.34	£4,661.44	£4,684.75	0.50%
£140,160.47	£4,207.92	£4,269.75	1.47%
£178,475.12	£3,883.43	£3,979.24	2.47%
£192,503.52	£4,161.59	£4,319.12	3.79%
£136,729.60	£4,781.65	£4,874.05	1.93%
£137,932.80	£4,866.67	£4,959.92	1.92%
£136,832.00	£5,043.42	£5,144.19	2.00%
£138,035.65	£4,458.18	£4,545.35	1.96%
£136,846.67	£3,891.65	£3,975.20	2.15%
£139,264.00	£3,847.90	£3,883.51	0.93%
£137,523.20	£4,180.75	£4,262.61	1.96%
£155,544.13	£4,614.48	£4,714.62	2.17%
£185,397.04	£3,917.31	£3,822.44	3.35%
£152,778.59	£7,107.82	£7,143.36	0.50%
£153,344.00	£6,493.34	£6,608.75	1.78%
£165,251.22	£6,486.16	£6,602.61	1.80%
£171,008.00	£5,859.21	£5,964.82	1.80%
£148,736.00	£6,603.56	£6,722.67	1.80%
£202,961.85	£5,955.90	£6,062.70	1.79%
£170,877.91	£5,947.30	£6,054.16	1.80%
£166,400.00	£6,021.90	£6,130.44	1.80%
£166,717.44	£5,778.73	£5,860.47	1.41%
£189,568.03	£6,316.13	£6,429.31	1.79%
£198,438.06	£6,525.47	£6,641.50	1.78%
£180,224.00	£6,114.66	£6,224.38	1.79%

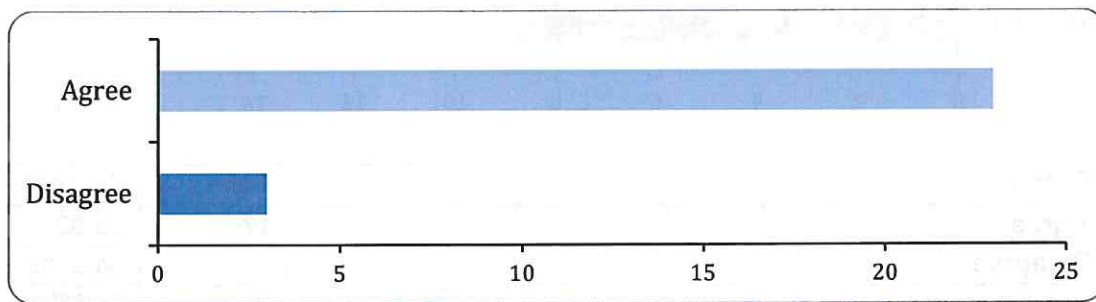
LAESTAB	(a)	(b)	(c)	2023-24 Actual NFF Allocations per APT submission before de-delegation (maintained schools) and including premises factors *(For academies this will differ from the GAG data)		Mainstream schools additional grant	2023-24 Adjusted APT Baseline Funding including protected grant		2024-25 Indicative NFF allocations using 2023-24 pupil numbers and data after Minimum Funding Guarantee and before de-delegation (maintained schools) including premises factors		Increase	Year on Year change
				(d)	(e)		(f) ((d)+(e))	(g)	(h) ((g)-(f))	(i) ((e)/(f))-1		
9422009	Northside Primary School		62	457,574	£16,152.00	£473,726.01	£481,242.40	£7,516.39	1.59%			
9422021	Dean CofE School		76	480,458	£13,762.00	£494,219.62	£501,765.75	£7,546.13	1.53%			
9422022	Caldew Lea School		231	1,259,886	£43,023.00	£1,302,909.89	£1,324,366.55	£21,457.66	1.65%			
9422024	Hensingham Primary School		132	702,419	£24,898.00	£727,316.57	£739,573.00	£12,256.43	1.69%			
9422025	Newtown Primary School		119	742,315	£27,823.00	£770,138.12	£782,734.81	£12,596.68	1.64%			
9422026	Great Corby Primary School		91	499,677	£15,755.00	£515,431.85	£523,970.43	£8,538.58	1.66%			
9422030	Kirkland Church of England Academy		26	283,317	£7,916.00	£291,233.12	£295,685.08	£4,451.96	1.59%			
9422100	Bassenthwaite Primary School		27	291,444	£8,139.00	£299,583.20	£304,209.86	£4,626.66	1.54%			
9422107	Fairfield Primary School		396	1,750,217	£54,962.00	£1,805,178.80	£1,831,396.80	£26,218.00	1.45%			
9422123	Lorton School		48	369,002	£10,326.00	£379,327.65	£385,343.00	£6,015.36	1.59%			
9422124	Ellenborough Academy		37	327,311	£10,161.00	£337,471.77	£338,455.89	£984.12	0.29%			
9422130	Seaton Academy		161	764,332	£25,437.00	£789,769.25	£803,097.46	£13,328.21	1.69%			
9422206	Thorhill Primary School		63	420,422	£14,399.00	£434,821.09	£436,289.45	£1,468.35	0.34%			
9423037	Wreay Church of England Primary School		395	1,747,135	£55,155.00	£1,802,289.65	£1,826,710.47	£24,420.82	1.35%			
9423402	Braithwaite CofE Primary School		32	316,940	£8,734.00	£325,674.33	£330,715.34	£5,041.01	1.55%			
9423410	Our Lady and St Patrick's Catholic Primary School, Maryport		170	917,382	£32,228.00	£949,609.64	£965,318.46	£16,708.82	1.65%			
9423415	St Gregory's Catholic Primary School, Workington		181	984,326	£34,473.00	£1,018,799.33	£1,035,678.30	£16,878.97	1.66%			
9423653	St Cuthberts Catholic Primary School, Carlisle		122	728,214	£23,916.00	£752,129.76	£764,423.53	£12,293.78	1.63%			
9423654	St Margaret Mary Catholic Primary School, Carlisle		198	985,508	£35,248.00	£1,020,756.24	£1,038,014.71	£17,258.48	1.69%			
9425905	Broughton Primary School		217	1,010,150	£34,597.00	£1,044,746.57	£1,062,509.91	£17,763.34	1.70%			
9425909	Englesfield Puddle CofE Primary Academy		185	823,976	£27,149.00	£851,125.28	£857,714.00	£6,588.72	0.77%			
9425911	Dearham Primary School		21	263,759	£7,217.00	£270,976.21	£275,110.16	£4,133.95	1.53%			
9425916	Gililand CofE Primary School		114	659,567	£22,028.00	£681,595.37	£693,010.67	£11,415.30	1.67%			
9425920	Castle Carrock School		44	355,309	£10,370.00	£365,679.41	£371,455.11	£5,775.70	1.56%			
9425923	Cresby-on-Eden CofE School		85	486,676	£15,353.00	£502,028.71	£510,304.74	£8,276.03	1.65%			
9424002	Energy Coast UTC		274	2,032,503	£67,818.00	£2,100,321.02	£2,110,058.73	£9,737.71	0.46%			
9424007	Workington Academy		1,054	6,755,091	£242,236.00	£6,997,326.77	£7,118,962.85	£121,636.08	1.74%			
9424015	The Whitehaven Academy		648	4,214,677	£159,606.00	£4,368,282.88	£4,443,745.37	£75,462.48	1.73%			
9424103	Cockermouth School		557	3,691,743	£135,174.00	£3,826,916.58	£3,893,262.57	£66,345.99	1.73%			
9424810	St Josephs Catholic High School, Workington		1,339	7,898,599	£279,314.00	£8,177,912.84	£8,320,822.53	£143,009.69	1.75%			
9425402	Trinity School		1,141	6,717,891	£238,860.00	£6,956,750.81	£7,078,675.07	£121,924.34	1.75%			
9425414	William Howard School		835	5,070,407	£174,280.00	£5,244,686.76	£5,285,313.29	£40,626.53	1.74%			
9425418	Caldew School		979	5,742,756	£196,914.00	£5,939,670.41	£6,021,322.44	£81,652.03	1.37%			
9426905	Richard Rose Morton Academy		834	5,514,416	£195,450.00	£5,709,865.84	£5,808,789.24	£98,923.40	1.73%			
9426906	Richard Rose Central Academy		939	6,106,068	£219,786.00	£6,325,853.95	£6,434,806.41	£108,952.47	1.72%			
9426907	West Lakes Academy		1,026	6,231,490	£222,376.00	£6,453,866.07	£6,566,437.48	£112,571.41	1.74%			



## School Funding Formula for 2024/25 Consultation

### 1: Do you agree with your Schools Forum recommendation that the National Funding Formula continues to be used to allocate funding to schools in 2024/25?

There were 26 responses to this part of the question.



Option	Total	Percent
Agree	23	88.46%
Disagree	3	11.54%
Not Answered	0	0.00%

#### Please add any further information below

There were 4 responses to this part of the question.

There is no evidence to support the proposed values and weightings within the schools National Funding Formula, nor are they informed by the cost of education

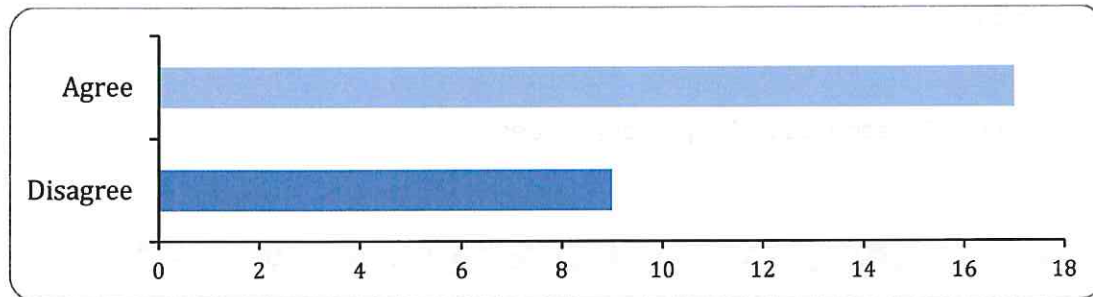
The amounts aren't enough and the changes came too quickly

It works for us

A hard national funding formula will be implemented shortly anyway

**2: Do you agree with your Schools Forum recommendation that if there is a shortfall in Schools Block funding after applying the National Funding Formula that this is managed by reducing the basic per pupil funding factor values in the formula?**

There were 26 responses to this part of the question.



Option	Total	Percent
Agree	17	65.38%
Disagree	9	34.62%
Not Answered	0	0.00%

**Please add any further information below**

There were 5 responses to this part of the question.

Not sustainable long term.

It ignores the significant comparable decline in the pay of teachers compared with other professions and the associated problems in recruitment and retention. It ignores the huge cuts to children's services elsewhere that are impacting on schools.

We are struggling to balance our budget now.

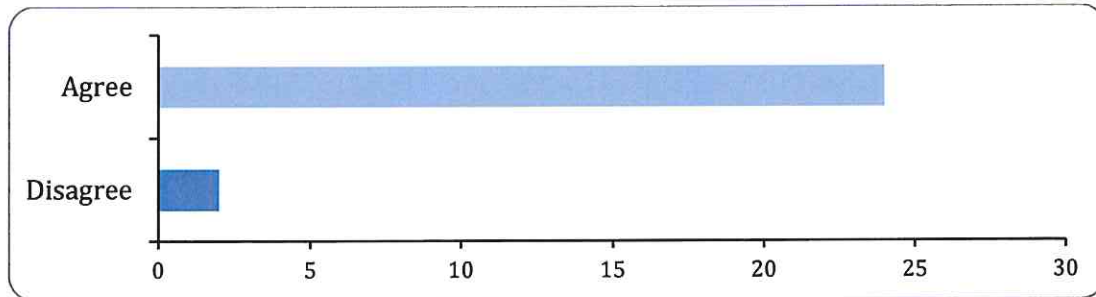
It is fair to spread any shortfall equally over all pupils in the county

currently schools budgets have been set based on 2023/24 funding levels any reduction to this will have a negative impact on the delivery of education as budgets are exceptionally tight and costs are increasing.



**3: Do you agree that, if there is any School Block funding remaining (up to a maximum of 0.5%) after allocating the school funding formula to schools using the NFF, it should be transferred to the High Needs Block?**

There were 26 responses to this part of the question.



Option	Total	Percent
Agree	24	92.31%
Disagree	2	7.69%
Not Answered	0	0.00%

**Please add any further information below**

There were 2 responses to this part of the question.

We think this is an acceptable use of excess funding

schools are not funded appropriately for SEN provision and if the 0.5% was to be used for recovery of the SEND deficit this is not helping the schools deliver SEN support,







**Cumberland  
Council**

<b>CUMBERLAND COUNCIL SCHOOLS FORUM</b>
<b>Report Title:</b> Maintained Schools De-delegation 2024/25
<b>Meeting date:</b> 2 November 2023
<b>Report of:</b> Dan Barton, Assistant Director, SEND, Education & Inclusion

## **1.0 Executive Summary**

- 1.1 In July 2023 the DfE confirmed that de-delegation will continue to be an option for maintained schools in 2024/25. The Schools Forum representatives for maintained schools are required on an annual basis to decide on the de-delegation options and are asked to vote on the options for 2024/25 separately, by primary and secondary phase.
- 1.2 The proposed de-delegation budgets are fixed amounts and therefore the primary and secondary per pupil rates for each authority are indicative as they have been based on October 2022 census pupil numbers. These will be updated in January 2024 to reflect October 2023 census pupil numbers.

## **2.0 Link to Council Plan Priorities**

- 2.1 Ensuring that maintained schools have access to services provided centrally is supportive of the Council Plan “to improve the health and wellbeing of its residents” and the priority to “address inequalities and enable its residents to access opportunities that will empower them to achieve their goals.”

## **3.0 Recommendation**

- 3.1 The Schools Forum representatives for maintained schools are recommended to continue to agree on behalf of the schools that they represent to de-delegate budget in 2024/25 for the services in paragraph 4.5.

## **4.0 Rationale & Evidence for the Recommendation**

### Background

- 4.1 De-delegated services are for maintained schools only, funding of these services must be allocated through the Schools Block via the school funding

formula but can be passed back (de-delegated) for maintained primary and secondary schools with Schools Forum approval. The DfE confirmed in July 2023 that de-delegation will continue to be an option for maintained schools in 2024/25.

- 4.2 The services under the de-delegated budgets also impact maintained PRUs, special schools and nursery schools and therefore in Cumberland an element is centrally retained in both the Early Years and High Needs Block for these services, although there is no de-delegation process for these two areas. The split of these budgets across the blocks is based on pupil numbers.
- 4.3 The current de-delegated services for 2023/24 as agreed last year are set out below:

<b>De-delegated Service</b>	<b>Primary</b>	<b>Secondary</b>
Contingencies	√	√
Staff Costs	√	√
Library Services	√	X
Insurance	√	√
School Improvement	√	X

- 4.4 A breakdown of the services provided under these headings is at Appendix 1 to this paper. Contingencies include exceptional unforeseen costs, schools in financial difficulties and costs relating to new, re-organised or closed schools. The staffing costs include teacher maternity and union duties reimbursements.

#### Proposed De-delegated Budgets 2024/25

- 4.5 It is not anticipated that there will be any change from the 2023/24 budgets as shown in the below table:

	Schools Block	High Needs Block	Early Years Block	Total 2023/24	Proposed Total 2024/25	Variance
	£m	£m	£m	£m	£m	£m
Contingencies	0.348	0.005	0.025	0.379	0.379	0.000
Insurance	0.373	0.005	0.027	0.405	0.405	0.000
Staff Costs	0.517	0.008	0.037	0.562	0.562	0.000
Library Services	0.250	0.005	0.023	0.277	0.277	0.000
School Improvement	0.311	0.006	0.028	0.344	0.344	0.000
<b>Total</b>	<b>1.799</b>	<b>0.029</b>	<b>0.140</b>	<b>1.967</b>	<b>1.967</b>	<b>0.000</b>

- 4.6 No schools have converted to academy status this year to date although one school has a provisional conversion date of 1 November and the de-delegated budget associated with this school is £0.015m but it is not proposed to change the value of the de-delegated budgets as a significant majority are linked to staff pay and therefore it is recommended that they continue, as in previous years, at the same level to allow for pay inflation and other cost pressures due to rising prices.
- 4.7 The figures in the table above are indicative figures only, final de-delegated budgets will be confirmed in January 2024 and the split between blocks will be based on the October 2023 census pupil data.

#### Insurance Arrangements



- 4.8 The Council's current insurance contracts with Zurich (property and vehicle insurance) and Maven Public Sector (liability and fidelity guarantee insurances) commenced on 1 April 2023 and is for a period of 3 years ending 31 March 2026. As the Schools Forum representatives for maintained schools agreed to continue to de-delegate for insurance in 2023/24 the next opportunity to consider new insurance options for maintained schools will be 2026.
- 4.9 Therefore, maintained school representatives are asked to vote separately for the primary and secondary phases on whether to also continue to de-delegated budget for the Contingency, Staffing, Library services and School Improvement in 2024/25. The decision is binding for all schools in that phase.
- 4.10 It should be noted if Schools Forum do not agree the de-delegated budgets and/or propose revised de-delegated budgets there is a risk that this will impact on continuity of services for maintained schools who will need to seek alternative arrangements to continue to access the same level of services that they currently receive from these budgets.

## 5.0 Options

5.1 The Schools Forum representatives for maintained schools can:

- Confirm agreement to de-delegate in 2024/25 by voting separately for primary and secondary schools for the following services:

De-delegated Service	Primary		Secondary	
	De-delegated in 2023/24	De-delegate in 2024/25?	De-delegated in 2023/24	De-delegate in 2024/25?
Contingencies	Yes		Yes	
Staff Costs	Yes		Yes	
Library Services	Yes		No	
School Improvement	Yes		No	

and (subject to the above):

### Option 1

- Agree the proposed 2024/25 de-delegated budgets as shown in table at para 4.5;

### Option 2

- Not agree the proposed 2024/25 de-delegated budgets as shown in table at para 4.5

And

- Propose revised 2024/25 de-delegated budgets.

5.2 It should be noted that the budgets at para 4.5 are indicative and final budgets will be confirmed in January 2023 along with the per pupil funding rates.

## 6.0 Financial and Other Relevant Implications

- 6.1 Resource and value for money implications are considered throughout this report. No equality/legal/ implications have been identified.

25 October 2023

---

### Appendices:

1. Cumberland De-delegated Budgets 2023/24

### REPORT AUTHOR

Contact:

Name Amanda Chew  
Post title Service Accountant  
Email: [amanda.chew@westmorlandandfurness.gov.uk](mailto:amanda.chew@westmorlandandfurness.gov.uk)



Westmorland  
& Furness  
Council

Working for Cumberland Council and  
Westmorland & Furness Council



## **De-delegated Budgets 2023/24**

### **Contingencies**

The DfE guidance states that the contingency budget can be used for three purposes:

- Exceptional unforeseen costs which it would be unreasonable to expect governing bodies to meet
- Schools in financial difficulties
- Additional costs relating to new, reorganised or closing schools

For 2023/24 the contingencies budget is £378,505.

Within the Schools Block funding formula, maintained school budgets are reduced by £16.00 (primary) and £23.61 (secondary) per pupil to fund this.

### **Insurance**

The local authority purchases insurance on behalf of maintained schools through the de-delegation arrangement. This covers the main classes of insurance - property, business interruption, liability and money. It does not cover other types of insurance – for example, motor insurance, school journey Insurance and supply teacher insurance. The Roman Catholic Diocese purchases insurance on behalf of Catholic schools (13 schools) for certain insurances. These schools receive a rebate from the de-delegation in respect of this. The table below outlines the insurances that are covered by the de-delegated budget:

<b>Insurance Type</b>	<b>Funded by the De-delegated insurance budget?</b>
Material Damage	Yes except for the 13 Catholic schools
Business Interruption	Yes except for the 13 Catholic schools
Work In Progress	Yes except for the 13 Catholic schools
Money	Yes
Employer's Liability	Yes
Public Liability	Yes
Official's Indemnity	Yes
Libel & Slander	Yes

Fidelity Guarantee	Yes
Personal Accident	Yes
Local Management of Schools (Balance of Risks)	No
School Journey	No
Supply Teacher	No
Motor	No
Occasional Business Use	No
Selected All Risks	No

For 2023/24, the de-delegated insurance budget is £405,035.

Within the Schools Block funding formula, maintained school budgets are reduced by £17.12 (primary) and £25.27 (secondary) per pupil to fund this. In line with how de-delegation operates, this is applied to all schools with the schools within the Roman Catholic diocese receiving a rebate for a portion of this deduction to reflect the insurance categories funded by the diocese.

### **Library Services**

The de-delegated budget covers the following services for primary schools, nursery schools and special schools:

- Book Loans – termly book boxes to support both the curriculum and reading for pleasure, chosen from specially selected stock; long term loans - during the year schools will be able to borrow up to their entitlement with the opportunity to exchange all or a proportion of the total. This can either be through the mobile library visit or through an alternative arrangement as agreed
- Mobile Library Service – giving children the opportunity to choose their own books in a unique library environment
- Spellbinding – annual book award and reading challenge for Y5 and Y6 to encourage reading for pleasure, and build confidence in talking and writing about books
- Key Stage 1 reading challenge – newly introduced to help develop reading for pleasure from an early age



- Help line - Our telephone help line offers access to professional librarians who are able to provide information and advice on all aspects of library services and library development

Service entitlements are based on current usage of the service and pupil numbers from the October census returns.

Schools are notified of their entitlement annually in writing and are invited to contact Library Services for Schools to discuss their entitlement or any other aspect of the service.

A charge will be made where a school requests a service in addition to their agreed entitlement and this will be invoiced separately.

For 2023/24, the de-delegated library services budget is £277,434

Within the Schools Block funding formula, maintained school budgets are reduced by £15.78 (primary) per pupil to fund this.

## **Staff Costs**

The de-delegated staff costs budget comprises the following:

### ***Maternity/ Adoption Leave***

Schools are reimbursed by the government for 92% of Statutory Maternity and Adoption Pay. The remaining 8% and all of the Occupational Maternity/ Adoption Pay is reimbursed to maintained schools in respect of teachers from this de-delegated budget. Maintained schools must submit evidence and reports to the local authority/ their payroll provider to claim this.

### ***Reimbursement of Union Duties***

Maintained schools receive reimbursement in respect of staff time spent performing agreed duties on behalf of the county in relation to unions.

### ***HR Advisory***

HR Advisory support to maintained schools and HR administration.

For 2023/24, the de-delegated staff costs budget is £561,584.

Within the Schools Block funding formula, maintained school budgets are reduced by £23.74 (primary) and £35.03 (secondary) per pupil to fund this.

## School Improvement

The budget supports the work of the School Improvement Team on improving and preparing schools for Ofsted inspection.

For 2023/24, the de-delegated school improvement budget is £344,484.

Within the Schools Block funding formula, maintained school budgets are reduced by £19.60 (primary) per pupil to fund this.



**CUMBERLAND COUNCIL SCHOOLS FORUM**

**Report Title:** Proposed Early Years Funding Formula 2024/25

**Meeting date:** 2 November 2023

**Report of:** Dan Barton, Assistant Director, SEND, Education & Inclusion

**1.0 Executive Summary**

- 1.1 This paper presents the modelling of the proposed new local funding formulae for 2 year olds and Under 2s for 2024/25 and the draft consultation (Appendix 1) with Cumberland early years providers including maintained schools, academies and private, voluntary and independent (PVI) providers.
- 1.2 It is proposed that the new funding formulae comprises of an hourly base rate and the mandatory deprivation supplement. No changes are proposed to the existing 3-4 year old funding formula except that a new methodology is proposed for calculating the deprivation supplement which will reach more disadvantaged children than the current methodology.
- 1.3 The modelling and proposed hourly rates at provider level are based on the illustrative local authority level hourly rates published by the DfE in its consultation on funding the new free entitlements for 2 year olds and Under 2s. Therefore the proposed funding formulae rates at provider level are indicative and subject to the final local authority level hourly rates being confirmed.
- 1.4 It is also proposed that £0.072m of the new 2 year-old and Under 2s funding is centrally retained to support the roll out of the new entitlements. The Schools Forum is asked to support this proposal in principle, subject to the final LA level rates being confirmed and the draft consultation seeking views on the proposals from early years providers which is planned to be opened on Thursday 9 November for a period of 3 weeks.
- 1.5 The consultation outcome will be presented at the 16 January 2024 meeting when the Schools forum will be asked to make a recommendation to Executive who will decide on the final new funding formulae at its meeting on 13 February 2024.

**2.0 Link to Council Plan Priorities**

2.1 Ensuring that early years providers are appropriately funded is supportive of the Council Plan “to improve the health and wellbeing of its residents” and the priority to “address inequalities and enable its residents to access opportunities that will empower them to achieve their goals.”

### 3.0 Recommendation

3.1 The Schools Forum is recommended to:

- support the proposed centrally retained budget of £0.072m;
- consult early years providers on the proposed new funding formulae for 2 year olds and Under 2s and new methodology for calculating the deprivation supplement;
- support the draft consultation document at Appendix 1 which includes 4 recommended questions to ask early years providers.

### 4.0 Rationale & Evidence for the Recommendation

#### Background

4.1 Currently all parents of 3-4 year olds can access 15 hours of free early education for 38 weeks of the year and working parents can access an additional 15 hours of free entitlement. Parents of disadvantaged 2-year olds can access 15 hours of free entitlement. The government are extending the eligibility to free entitlement so that all eligible working parents will be able to access 30 hours of free entitlement for 38 weeks of the year from the term after their child turns 9 months old. This will be rolled out in stages:

- From April 2024 all eligible working parents of 2-year olds can access 15 hours per week
- From September 2024 all eligible working parents of children aged 9 months up to 3-years old can access 15 hours per work extending to 30 hours from September 2025

4.2 The DfE has consulted local authorities and early years providers on its proposals for funding local authorities for the new early years free entitlement and in July 2023 published illustrative local authority level hourly funding rates for 2 year olds and Under 2s which for Cumberland are as follows:

Phase	LA Hourly Funding Rate
2-year olds	£7.25
Under 2-year olds	£9.84

4.3 The DfE proposes to apply the same funding rules to the new 2 year old and Under 2s funding which currently apply to the 3-4 year old funding which are as follows:



- LAs must use a universal base rate of funding for all providers regardless of type;
  - LAs must plan to pass-through at least 95% of the funding that it receives in 2024/25 to early years providers (rising to 97% from 2025/26).
  - LAs are required to establish a SEN Inclusion Fund to support children who are taking up the 3-4 year old free entitlements, targeted at children with lower level and emerging SEN.
  - LAs can use a restricted number of supplements in their 3-4 year old funding formula to channel additional funding (up to a cap of 12% of planned formula funding to providers) meeting criteria set by the LA.
  - LAs can set aside contingency funding as part of their local budgetary process to help manage fluctuations in take-up.
- 4.4 All 2 year-olds and Under 2s meeting the existing criteria for Early Years Pupil Premium (EYPP) and Disability Access Funding (DAF) for 3-4 year olds will be eligible for additional funding.
- 4.5 The DfE are not proposing to make any changes to way funding is allocated to local authorities for 3-4 year olds or the maintained nursery school (MNS) supplementary funding. The outcome of the DfE consultation has not yet been published although the principles it will apply are not expected to be significantly different to those proposed in its consultation.

#### Proposed New 2-Year Olds and Under 2s Funding Formulae

- 4.6 The DfE has provided local authorities with estimated numbers of part-time equivalent (PTEs) children that they anticipate will take-up the new entitlements to help them plan their budgets and shape their local funding formulae.
- 4.7 Currently, the local authority passes on the full hourly funding rate it receives for disadvantaged 2 year olds to early years providers. In 2024/25 local authority will be allowed to retain up to 5% of the new funding it receives for 2 year olds and Under 2s centrally with the support of Schools Forum.
- 4.8 In considering the shape of the new funding formulae at provider level the local authority first needs to consider what level of funding is needed to support early years providers centrally and how much SEN Inclusion Fund will be required. The remaining funding after taking these 2 factors into account is available for the new early years funding formulae for 2 year olds and Under 2s.
- 4.9 Consideration has been given to the additional resource and administration that will be associated with the roll out of the new free entitlements and, based on the principle that as much funding as possible should be passed directly onto early years providers with central spend kept at a minimum, it is proposed that £0.072m (split as £0.053m for 2 year olds and £0.019m for Under 2s) of the new funding is retained centrally to support the early years staffing team.
- 4.10 Currently, the SEN Inclusion Fund budget for disadvantaged 2-year olds is £0.026m. Based on estimated take-up of the new free entitlements it is

anticipated that £0.174m (split as £0.128m for 2 year olds and £0.046m for Under 2s) will be required. This has been calculated based on the estimated number of children taking up the new entitlements requiring SEND support multiplied by the current average hourly funding rate claimed of £3.09 x 15 hours x 38 weeks. It is estimated that 4% of total children taking up the new entitlements will access the fund and this has been based on the same percentage of children currently receiving support from the fund. It is proposed the current criteria for accessing SENIF and the 3 Levels of support based on need will remain the same as it is currently for the time being.

- 4.11 It is proposed that the new funding formulae at provider level comprise of an hourly base rate and the mandatory deprivation supplement mirroring the current 3-4 year old funding formula (with the exception of the quality supplement which provides additional funding to school-based providers of early years provision that were in receipt of the former teacher pay and pension grants).
- 4.12 It is not proposed to use any of the other optional supplements available for local authorities to use which are as follows:
- Flexibility: to support providers offering flexible provision for parents – e.g. out of hours / wraparound;
  - Rurality / Sparsity: to enable local authorities to support providers serving rural areas less likely to benefit from economies of scale;
  - English as an additional language: to recognise differences in attainment in the Early Years Foundation Stage between children whose first language is English, and those who have English as an additional language (EAL).
- 4.13 There are 2 main reasons why the use of the optional supplements is not recommended. Firstly, the hourly funding rate at local authority level does not reflect any additional funding in recognition of rurality or flexibility and secondly channelling funding through supplements reduces the hourly base rate for all providers as the funding available for the formula is a fixed amount.
- 5.0 The current deprivation supplement for the 3-4 year old funding formula is £0.21 per hour. It is allocated to providers based on eligible children using a combination of deprivation measures comprising of 60% ACORN, 20% IDACI and 20% IMD. In the 2022/23 academic year 28.42% of 3-4 year olds in the local authority attracted funding through this supplement.
- 6.0 It is proposed to use the same rate for the new 2 year old and Under 2s funding formulae but to change the methodology used to allocate the supplement to providers to target more disadvantaged children. It is proposed to allocate the supplement to providers using IDACI by allocating it to children whose postcodes are in the IDACI Bands A to F:



Band	Ranks	Description
A	1 to 821	Children in the most deprived 2.5% of LSOAs*
B	822 to 2463	Children in the next most deprived 5% of LSOAs
C	2464 to 4105	Children in the next most deprived 5% of LSOAs
D	4106 to 5747	Children in the next most deprived 5% of LSOAs
E	5748 to 9032	Children in the next most deprived 10% of LSOAs
F	9033 to 12316	Children in the next most deprived 10% of LSOAs
* LSOA - Lower Layer Super Output Area		

7.0 This will target funding to those children living in the 37.5% most deprived areas. By using this new proposed methodology it is estimated that 36.47% of 3-4 year olds would attract funding through this supplement. It is estimated that the same proportion of children taking up the new free entitlements would attract funding through this supplement.

7.1 Therefore, after taking into consideration the proposed centrally retained budgets, the SEN Inclusion fund and the estimated funding channelled through the deprivation supplement of £0.21 per hour the proposed base rate for the 2 year olds has been calculated as £7.00 and £9.59 for the Under 2s as summarised in the 2 tables below:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding	%
Illustrative funding for 2024/25	1,816.53	£7.25	£7,506,810	100.00%
Proposed Centrally Retained Element:			£53,170	0.71%
Proposed SEN Inclusion Fund:	72.66	£3.09	£128,034	1.71%
Funding Available for Formula:			£7,325,606	97.59%
<u>Proposed EYFF</u>				
Base Rate:	1,816.53	£7.00	£7,246,305	96.53%
Deprivation:	662.5	£0.21	£79,301	1.06%
<b>Total Early Years Formula Funding:</b>			<b>£7,325,606</b>	<b>97.59%</b>

Under 2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding	%
Estimated funding for 2024/25	648.80	£9.84	£3,638,989	100.00%
Proposed Centrally Retained Element:			£18,990	0.52%
Proposed SEN Inclusion Fund:	25.952	£3.09	£45,730	1.26%
Funding Available for Formula:			£3,574,269	98.22%
<u>Proposed EYFF</u>				
Base Rate:	648.80	£9.59	£3,545,946	97.44%
Deprivation:	236.62	£0.21	£28,323	0.78%
<b>Total Early Years Formula Funding:</b>			<b>£3,574,269</b>	<b>98.22%</b>

7.2 For the Under 2s it should be noted that the modelling has been based on a full year impact however, the proposed funding rates will apply from September 2024 in line with the planned roll out of this phase.

7.3 For the 2 year olds, it is recognised that the proposed combined base rate of £7.00 plus the deprivation supplement of £0.21 which totals £7.21 is lower than the current funding rate that providers receive of £7.24 for disadvantaged

2 year olds (which comprises of a base rate £5.63 and early years supplementary grant of £1.61).

7.4 This is partly due to the new funding formula used by the DfE to calculate the LA level funding rate which is based on a (national rate + additional needs) x area cost adjustment and funds both disadvantaged 2 year olds and working parents of 2 year olds whereas the current funding formula only funds disadvantaged 2 year olds.

7.5 Consideration has been given to increasing the deprivation supplement rate of £0.21 to a level that would uplift the combined base and deprivation rate to £7.24. However, as the funding available for the funding formula is a fixed amount the more funding allocated through the deprivation supplement the lower the amount of funding available for the base rate as the below example tables demonstrate:

Table 1 – Deprivation held at £0.21 per hour:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding	%
<u>Proposed EYFF</u>				
Base Rate:	1,816.53	£7.00	£7,246,305	96.53%
Deprivation:	662.5	£0.21	£79,301	1.06%
<b>Total Early Years Formula Funding:</b>			<b>£7,325,606</b>	<b>97.59%</b>

Table 2 – Impact on base rate of increasing Deprivation rate:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding	%
<u>Proposed EYFF</u>				
Base Rate:	1,816.53	£6.96	£7,204,766	95.98%
Deprivation:	662.5	£0.32	£120,840	1.61%
<b>Total Early Years Formula Funding:</b>			<b>£7,325,606</b>	<b>97.59%</b>

7.6 As shown in Table 2, the deprivation supplement would need to be set at £0.32 to achieve a combined rate of £7.24 but the base rate for all providers would reduce to £6.96 having a wider and significant impact on overall funding levels for all providers.

7.7 The impact of the proposed 2 year old base rate for the new free entitlement on those providers that currently charge parents has also been considered. The current hourly rates charged by providers to fee paying parents of 2 year olds varies but the average is in the region of £7.00 locally. Therefore, it is proposed to hold the deprivation rate at £0.21 to ensure that the base rate is as close to the average charged by providers as possible so that the impact of moving from fee paying to free entitlement is kept to a minimum.

7.8 In addition to the deprivation supplement additional funding to support disadvantaged children is available through the EYPP. The DfE have not yet announced the EYPP hourly rate for 2024/25 which local authorities are required to pass on to providers in full.

7.9 The indicative funding rates assume a standard 190 term days in the financial year (April to March), however, early years providers will continue to be funded



based on the actual numbers of term days which can be higher or lower than 190 days each financial year.

7.10 The local authority is obliged to consult providers on any changes to existing and new early years funding formulae. Therefore, in anticipation that Schools Forum support the proposals attached at Appendix 1 is a draft consultation document seeking views from maintained schools, academies and PVI's.

7.11 The draft consultation asks 4 questions:

- 1) Local authorities are allowed to retain up to 5% of the new funding in 2024/25. Do you agree with your Schools Forum recommendation that the centrally retained funding for 2 year olds and Under 2s should be kept to a minimum to maximise the amount of the funding available to distribute to early years providers?
- 2) Do you agree that the new funding formulae for 2 year olds and Under 2s should comprise of a base rate and the mandatory deprivation supplement only and not use the optional supplements?
- 3) Do you agree that the deprivation supplement should be allocated to providers based on early years children accessing free entitlement living in IDACI bandings A to F instead of the current methodology for deprivation?
- 4) Do you agree that the deprivation supplement hourly funding rate should be fixed at £0.21 to maximise the base rate paid to providers?

7.12 Schools Forum can recommend alternative questions to include. The consultation is planned to open on 9 November and run for a period of 3 weeks. The outcome of the consultation will be presented to Schools Forum on 16 January 2024 when it will be asked to make a recommendation to Executive members who will decide on the final early years funding formula for 2024/25 at its meeting on 13 February 2024.

## **8.0 Options**

8.1 Schools Forum can:

- support the proposed centrally retained budget of £0.072m;

or

- not support the proposed centrally retained budget of £0.072m;

and

- support the proposed new funding formulae for 2 year olds and Under 2s comprising of a base rate and a mandatory deprivation supplement;
- support the proposed new methodology for calculating the deprivation supplement;
- support the draft consultation document at Appendix 1 and the 4 recommended questions to ask;

or

- recommend alternative questions to ask early years providers.

8.2 It should be noted the proposed hourly rates for the 2 year olds and Under 2s formulae is subject to final confirmation of the LA level hourly rates which are expected to be published later in the Autumn term.

## 9.0 Financial and Other Relevant Implications

9.1 Resource and value for money implications are considered throughout this report. No equality/legal/ implications have been identified.

25 October 2023

---

Appendices:

1. Draft Cumberland Early Years Funding Formula 2024/25 Consultation

## **REPORT AUTHOR**

Contact:

Name Amanda Chew  
Post title Service Accountant  
Email: [amanda.chew@westmorlandandfurness.gov.uk](mailto:amanda.chew@westmorlandandfurness.gov.uk)



Westmorland  
& Furness  
Council

Working for Cumberland Council and  
Westmorland & Furness Council





**Early Years Funding Formulae  
for 2024/25**

**Consultation**

**Consultation between Cumberland Schools Forum and  
Early Years Providers within Cumberland**

**Consultation Commences: Thursday 9 November 2023**

**Deadline for responding to the [consultation](#): Thursday 30 November 2023**

## Introduction

1. Currently all parents of 3-4 year olds can access 15 hours of free early education for 38 weeks of the year and eligible working parents can access an additional 15 hours of free entitlement. Parents of disadvantaged 2-year olds can access 15 hours of free entitlement. The government is extending the eligibility to free entitlement so that all eligible working parents will be able to access 30 hours of free entitlement for 38 weeks of the year from the term after their child turns 9 months old. This will be rolled out in stages:
  - From April 2024 all eligible working parents of 2-year olds can access 15 hours per week
  - From September 2024 all eligible working parents of children aged 9 months up to 3-years old can access 15 hours per work extending to 30 hours from September 2025
2. The DfE has consulted local authorities and early years providers on its proposals for funding local authorities for the new early years free entitlement and in July 2023 published illustrative local authority level hourly funding rates for 2 year olds and Under 2s. These rates are how local authorities are funded for the new entitlements by the DfE and local authorities use a local funding formulae to pass on the funding to early year providers. The local authority level funding rates for Cumberland are as follows:

Phase	LA Hourly Funding Rate
2-year olds	£7.25
Under 2-year olds	£9.84

3. The DfE proposes to apply the same funding rules to the new 2 year old and Under 2s funding which currently apply to the 3-4 year old funding which are as follows:
  - LAs must use a universal base rate of funding for all providers regardless of type;
  - LAs must plan to pass-through at least 95% of the funding that it receives in 2024/25 to early years providers (rising to 97% from 2025/26).
  - LAs are required to establish a SEN Inclusion Fund (SENIF) to support children who are taking up the 3-4 year old free entitlements, targeted at children with lower level and emerging SEN.
  - LAs can use a restricted number of supplements in their 3-4 year old funding formula to channel additional funding (up to a cap of 12% of planned formula funding to providers) meeting criteria set by the LA.



- LAs can set aside contingency funding as part of their local budgetary process to help manage fluctuations in take-up.
4. All 2 year-olds and Under 2s meeting the existing criteria for Early Years Pupil Premium (EYPP) and Disability Access Funding (DAF) for 3-4 year olds will be eligible for additional funding.
  5. The DfE are not proposing to make any changes to way funding is allocated to local authorities for 3-4 year olds or the maintained nursery school (MNS) supplementary funding. The outcome of the DfE consultation has not yet been published although the principles it will apply are not expected to be significantly different to those proposed in its consultation.
  6. This document comprises a consultation with all Cumberland early years providers including maintained schools, academies and private, voluntary and independent providers to seek views on the proposed new local early years funding formulae for the new 2 year olds and Under 2s free entitlements for 2024/25. The consultation also considers a new methodology for allocating the deprivation supplement which is proposed to be used in the new 2 year olds, Under 2s and existing 3-4 year olds funding formulae.
  7. It is important to note that the proposed hourly funding rates at provider level for the 2 year olds and Under 2s are indicative and subject to final confirmation of the local authority level funding rates which are expected to be published by the DfE later in the Autumn term along with the 3-4 year old local authority level rates which have not yet been confirmed.
  8. All early years providers are encouraged to respond to this consultation using the [online survey](#). The deadline for responding to the consultation is 30 November 2023. The outcome of the consultation will be reported to Schools Forum at their next meeting on 16 January who will, after taking into consideration the consultation results, make a recommendation to Executive members who will decide on the final shape of the local early funding formulae for 2024/25 in February 2024.
  9. Early years providers can find further detailed information on the DfE's proposals for the funding the new entitlements at: <https://consult.education.gov.uk/funding-policy-unit/early-years-funding-extension-of-the-entitlements/>

### **Cumberland Proposed new 2 Year Olds and Under 2s Local Early Years Funding Formulae 2024/25**

10. The DfE has provided local authorities with estimated numbers of part-time equivalent (PTEs) children that they anticipate will take-up the new entitlements to help them plan their budgets and shape their local funding formulae.
11. Currently, the local authority passes on the full hourly funding rate it receives for disadvantaged 2 year olds to early years providers. In 2024/25 local authority will be allowed to retain up to 5% of the new funding they receives for 2 Year Olds and Under 2s centrally with the support of their Schools Forum.

12. In considering the shape of the new funding formulae at provider level the local authority first needs to consider what level of funding is needed to support early years providers centrally and how much SENIF will be required. The remaining funding after taking these 2 factors into account is available for the new early years funding formulae for 2 Year Olds and Under 2s.
13. Consideration has been given to the additional resource and administration that will be associated with the roll out of the new free entitlements and, based on the principle that as much funding as possible should be passed directly onto early years providers with central spend kept at a minimum, it is proposed that £0.072m (split as £0.053m for 2 year olds and £0.019m for Under 2s) of the new funding is retained centrally to support the early years staffing team.

**Consultation Question 1:**

**Local authorities are allowed to retain up to 5% of the new funding in 2024/25. Do you agree with your Schools Forum recommendation that the centrally retained funding for 2 year olds and Under 2s should be kept to a minimum to maximise the amount of the funding available to distribute to early years providers?**

14. Currently, the SENIF budget for disadvantaged 2-year olds is £0.026m. Based on estimated take-up of the new free entitlements it is anticipated that £0.174m (split as £0.128m for 2 year olds and £0.046m for Under 2s) will be required. This has been calculated based on the estimated number of children taking up the new entitlements requiring SEN support multiplied by the current average hourly funding rate claimed of £3.09 x 15 hours x 38 weeks. It is estimated that 4% of total children taking up the new entitlements will access the fund and this has been based on the same percentage of children currently receiving support from the fund. It is proposed the current criteria for accessing SENIF and the 3 Levels of support based on need will remain the same as it is currently for the time being as follows:
  - Level one £1,000 (£1.75 per hour)
  - Level two £1,500 (£2.63 per hour)
  - Level three £2,000 (£3.51 per hour)
15. It is proposed that the new funding formulae for 2 Year Olds and Under 2s at provider level comprise of an hourly base rate and the mandatory deprivation supplement mirroring the current 3-4 year old funding formula (with the exception of the quality supplement which provides additional funding to school-based providers of early years provision that were in receipt of the former teacher pay and pension grants).
16. It is not proposed to use any of the other optional supplements available for local authorities to use which are as follows:



- Flexibility: to support providers offering flexible provision for parents – e.g. out of hours / wraparound;
- Rurality / Sparsity: to enable local authorities to support providers serving rural areas less likely to benefit from economies of scale;
- English as an additional language: to recognise differences in attainment in the Early Years Foundation Stage between children whose first language is English, and those who have English as an additional language (EAL).

17. There are 2 main reasons why the use of the optional supplements is not proposed. Firstly, the hourly funding rate at local authority level does not reflect any additional funding in recognition of rurality or flexibility and secondly channelling funding through supplements reduces the hourly base rate for all providers as the funding available for the formula is a fixed amount.

**Consultation Question 2:**

**Do you agree that the new funding formulae for 2 year olds and Under 2s should comprise of a base rate and the mandatory deprivation supplement only and not use the optional supplements?**

18. The current deprivation supplement for the 3-4 year old funding formula is £0.21 per hour. It is allocated to providers based on eligible children using a combination of deprivation measures comprising of 60% ACORN, 20% IDACI and 20% IMD<sup>1</sup>. In the 2022/23 academic year 28.42% of 3-4 year olds in the local authority attracted funding through this supplement.

19. It is proposed to use the same rate for the new 2 Year Old and Under 2s funding formulae but to change the methodology used to allocate the supplement to providers to target more disadvantaged children. It is proposed to allocate the supplement to providers using IDACI by allocating it to children whose postcodes are in the IDACI Bands A to F:

Band	Ranks	Description
A	1 to 821	Children in the most deprived 2.5% of LSOAs <sup>2</sup>
B	822 to 2463	Children in the next most deprived 5% of LSOAs
C	2464 to 4105	Children in the next most deprived 5% of LSOAs
D	4106 to 5747	Children in the next most deprived 5% of LSOAs
E	5748 to 9032	Children in the next most deprived 10% of LSOAs
F	9033 to 12316	Children in the next most deprived 10% of LSOAs
<sup>2</sup> LSOA - Lower Layer Super Output Area		

<sup>1</sup>A Classification of Residential Neighbourhoods (ACORN), Income Deprivation Affecting Children Index (IDACI), Index of Multiple Deprivation (IMD)

20. This will target funding to those children living in the 37.5% most deprived areas. By using this new proposed methodology it is estimated that 36.47% of 3-4 year olds would attract funding through this supplement. It is estimated that the same proportion of children taking up the new free entitlements would attract funding through this supplement.

**Consultation Question 3:**

**Do you agree that the deprivation supplement should be allocated to providers based on early years children accessing free entitlement living in IDACI bandings A to F instead of the current methodology for deprivation?**

21. After taking into consideration the proposed centrally retained budgets, the SEN Inclusion fund and the estimated funding channelled through the deprivation supplement of £0.21 per hour the proposed base rate for the 2 Year Olds has been calculated as £7.00 and £9.59 for the Under 2s as summarised in the 2 tables below:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding	%
Illustrative funding for 2024/25	1,816.53	£7.25	£7,506,810	100.00%
Proposed Centrally Retained Element:			£53,170	0.71%
Proposed SEN Inclusion Fund:	72.66	£3.09	£128,034	1.71%
Funding Available for Formula:			£7,325,606	97.59%
<b>Proposed EYFF</b>				
Base Rate:	1,816.53	£7.00	£7,246,305	96.53%
Deprivation:	662.5	£0.21	£79,301	1.06%
<b>Total Early Years Formula Funding:</b>			<b>£7,325,606</b>	<b>97.59%</b>

Under 2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding	%
Estimated funding for 2024/25	648.80	£9.84	£3,638,989	100.00%
Proposed Centrally Retained Element:			£18,990	0.52%
Proposed SEN Inclusion Fund:	25.952	£3.09	£45,730	1.26%
Funding Available for Formula:			£3,574,269	98.22%
<b>Proposed EYFF</b>				
Base Rate:	648.80	£9.59	£3,545,946	97.44%
Deprivation:	236.62	£0.21	£28,323	0.78%
<b>Total Early Years Formula Funding:</b>			<b>£3,574,269</b>	<b>98.22%</b>



22. For the Under 2s it should be noted that the modelling has been based on a full year impact however, the proposed funding rates will apply from September 2024 in line with the planned roll out of this phase.
23. For the 2 year olds, it is recognised that the proposed combined base rate of £7.00 plus the deprivation supplement of £0.21 which totals £7.21 is lower than the current funding rate that providers receive of £7.24 for disadvantaged 2 year olds (which comprises of a base rate £5.63 and early years supplementary grant of £1.61).
24. This is partly due to the new funding formula used by the DfE to calculate the local authority level funding rate which is based on a (national rate + additional needs) x area cost adjustment and funds both disadvantaged 2 year olds and working parents of 2 year olds whereas the current funding formula only funds disadvantaged 2 year olds.
25. Consideration has been given to increasing the deprivation supplement rate of £0.21 to a level that would uplift the combined base and deprivation rate to £7.24. However, as the funding available for the funding formula is a fixed amount the more funding allocated through the deprivation supplement the lower the amount of funding available for the base rate as the below example tables demonstrate:

Table 1 – Deprivation held at £0.21 per hour:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding	%
<u>Proposed EYFF</u>				
Base Rate:	1,816.53	£7.00	£7,246,305	96.53%
Deprivation:	662.5	£0.21	£79,301	1.06%
<b>Total Early Years Formula Funding:</b>			<b>£7,325,606</b>	<b>97.59%</b>

Table 2 – Impact on base rate of increasing Deprivation rate:

2 Year Olds	Estimated PTEs	LA Hourly Rate	Total Funding	%
<u>Proposed EYFF</u>				
Base Rate:	1,816.53	£6.96	£7,204,766	95.98%
Deprivation:	662.5	£0.32	£120,840	1.61%
<b>Total Early Years Formula Funding:</b>			<b>£7,325,606</b>	<b>97.59%</b>

26. As shown in Table 2, the deprivation supplement would need to be set at £0.32 to achieve a combined rate of £7.24 but the base rate for all providers would reduce to £6.96 having a wider and significant impact on overall funding levels for all providers.
27. The impact of the proposed 2 year old base rate for the new free entitlement on those providers that currently charge parents has also been considered. The current hourly rates charged by providers to fee paying parents of 2 year olds varies but the average is in the region of £7.00 locally. Therefore, it is proposed

to hold the deprivation rate at £0.21 to ensure that the base rate is as close to the average charged by providers as possible so that the impact of moving from fee paying to free entitlement is kept to a minimum.

28. In addition to the deprivation supplement additional funding to support disadvantaged children is available through the EYPP. The DfE have not yet announced the EYPP hourly rate for 2024/25 which local authorities are required to pass on to providers in full.

**Consultation Question 4:**

**Do you agree that the deprivation supplement hourly funding rate should be fixed at £0.21 to maximise the base rate paid to providers?**

29. The proposed new funding formulae hourly rates for 2 year olds and Under 2s are indicative only and are subject to final confirmation of the local level hourly funding rates which are expected to be published later in the Autumn term along with the 3-4 year old funding rates.
30. The indicative funding rates assume a standard 190 term days in the financial year (April to March), however, early years providers will continue to be funded based on the actual numbers of term days which can be higher or lower than 190 days each financial year.

**Areas not impacted by this Consultation**

31. It should be noted that the following funding streams are not impacted by this consultation:
- Mainstream Schools Reception to Year 11 funding
  - Special School and Pupil Referral Units
  - Post 16 Education
  - Other government grants including Pupil Premium, Universal Infant Free School Meals, Primary Sport & PE grant.

**Responding to the Consultation**

24. Early years providers are invited to respond to the 4 questions in this consultation using the [online survey](#) by **Thursday 30 November 2023**. Returns submitted after this date will not be included.
25. We encourage every early years provider to respond. We kindly ask that there is only one response per provider.



<b>CUMBERLAND COUNCIL SCHOOLS FORUM</b>
<b>Report Title: Delivering Better Value in SEND Briefing - An overview of the DBV programme with relevant updates</b>
<b>Meeting date: 2 November 2023</b>
<b>Report of: Dan Barton, Assistant Director – SEND, Education &amp; Inclusion</b>

## **1.0 Executive Summary**

- 1.1 The Delivering Better Value in SEND programme was commissioned to identify the changes a Local Authority can make to support children and young people with SEND.
- 1.2 The initial two workstreams have been further developed and split into a project plan of six workstreams – a copy of our 'Plan on a Page' is attached at Appendix 1.
- 1.3 Our initial priorities are:
  - Develop a Teaching Assistant Academy to drive recruitment and retention
  - Develop and Implement revised SEND Involvement Process
  - Increase the number of Schools offering Resourced Provision places.
- 1.4 Progress has been made against each of these along with many other workstream elements and at a recent monitoring meeting the DfE confirmed they were happy with our plans and progress to date.

## **2.0 Link to Council Plan Priorities**

- 2.1 Ensuring that schools are funded appropriately is supportive of the Council Plan “to improve the health and wellbeing of its residents” and the priority to “address inequalities and enable its residents to access opportunities that will empower them to achieve their goals.”

## **3.0 Progress**

- 3.1 **Workstream 1 - Training and Development** – In the last 12 months the Autism Specialist Advisory Teaching team has achieved fantastic success with the roll-out of the Autism Education Trust Training Programme. 106 sessions have been delivered across Cumberland and Westmorland & Furness, with 3033 attendees in the Cumberland area alone. Across all

metrics of delegate feedback, the team averaged 4.6 out of 5, showing both the strength of content and the high level and impact of their delivery. In addition, the SEND Conference dates have been confirmed as 11<sup>th</sup> and 12<sup>th</sup> January 2024. This now has a more detailed plan in place, including speakers, venue, catering, workshop holders and exhibitors. The Eventbrite booking link will shortly be going live.

- 3.2 **Workstream 2 – Data Analysis** – Mastodon have been contracted to undertake analysis of our data to identify areas of need and future demand for potential Resource Provision places. We have also had demonstrations of potential Quality Assurance software and procurement arrangements are currently being discussed.
- 3.3 **Workstream 3 – Prevention and Early Intervention** – Support has been gained from across the system for removing the SEND Referral Process from the Social Care Early Help System. This is being revised to be more streamlined and focussed on educational needs, with the ability to make sideways referrals into Early Help and Health where required. The aim is to reduce the burden for referral and allow quicker access to early intervention programmes. It also aims to provide more relevant information for our staff to enable improved threshold decision making. A workshop with stakeholders was held on 18<sup>th</sup> October with the aim of a pilot of the revised form early in January 2024.
- 3.4 **Workstream 4 – Stakeholder and Partnership Work** – We have approached SENDAC (Parent Carer Forum) to deliver a coproduction workshop at the SEND Conference, they are discussing this with their forum, and we hope to have an update soon. We are also working with SENDAC and Health colleagues to update the Local Offer to increase its ease of use, ensure it contains the right information and to reduce jargonistic language. A Working Group are meeting regularly to move this forward including the aforementioned partners. In an effort to reduce the dense language on the Local Offer a separate professional's hub has been established. This is the home for all professionally focused documentation, policies, guidance, training, and templates. This is now live and initial feedback is positive.
- 3.5 **Workstream 5 – Infrastructure/Provision Strategy** – The Cumberland Inclusion Strategy is fully developed and awaiting sign off from the Council Executive. Links and crossovers with other Council Plans and the SEND Partnership continuous improvement plans have been mapped.
- 3.6 **Workstream 6 – Capacity Building** – Resourced Provision Expressions of Interest have been requested from Schools and a needs analysis completed. Schools have until 10<sup>th</sup> of November to make their submissions and will be informed of the outcomes by the end of the month. Initial conversations for the Teaching Assistant Academy have been held with support from across the system. As this will drive recruitment and retention the first step we are taking is to ask our current Teaching Assistants for their views via a survey. Communications will shortly be going out to schools to update them and to let them know how they can help, with the survey being issued during the next half term.



## 4.0 Financial & Other Relevant Implications

- 4.1 DBV funding is £1 million phased over the next two years, regular planning and monitoring meetings are in place with Finance colleagues.

25 October 2023

---

Appendices:



Plan on a Page.pdf

## **REPORT AUTHOR**

Contact:

Name Lesley Gates

Post title Senior Programme Lead – Delivering Better Value in SEND

Email: [Lesley.gates@cumberland.gov.uk](mailto:Lesley.gates@cumberland.gov.uk)



Westmorland  
& Furness  
Council

Working for Cumberland Council and  
Westmorland & Furness Council

