



Children's Strategic Services

Scheme for Financing Schools

Funding Formula

2012/2013

Scheme For Financing Schools Funding Formula

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Introduction

Introduction

1. This description of the formulae operating to objectively allocate resources to schools complements the Bournemouth Scheme for Financing Schools.
2. The Schools Standards and Framework Act 1998 (SSAF Act) Section 4 provides for Local Authorities (LAs) to establish a mechanism for the allocation of school resources as part of the Individual Schools Budget (ISB).
3. This document sets out the details of how the main and supplementary formulae operate for all schools.
4. The various sub-formulae have been developed by the Schools' Forum and have been subject to consultation with all schools.
5. The unit values and weightings for each element of the formulae are published annually in the Authority's Children's, Schools' & Families' Financial Data Collection Budget Statement.

Pupils Permanently Excluded

(Mainstream Schools only)

6. Where, during the course of a financial year, a pupil is permanently excluded from a primary or secondary school covered by the scheme, that school's budget share for that year will be reduced. The amount will be determined by Regulations made by the Secretary of State.
7. The school's budget share shall be reduced by the amount: -
$$A \times (B/52)$$

A is the AWPU sum attributable to a registered pupil of the same age group as the pupil in question in the financial year in which the permanent exclusion takes effect (the relevant date).

B is the number of complete weeks remaining in the financial year calculated from the relevant date

or

is the number of complete weeks remaining in that school year calculated from the relevant date, where the exclusion takes effect between 1 April to 31 August (inclusive) and pupils of the same age group as the pupil in question normally leave that school prior to being admitted to a secondary school.
8. These arrangements apply only in circumstances where pupils have been excluded from a school. They do not apply to any other transfer of pupils between schools taking place in year or in respect of pupils moving into an area part way through an academic year.

Introduction

Pupils Admitted Following a Permanent Exclusion

(Mainstream Schools only)

9. Where, during the course of a financial year, a school admits a pupil who has been permanently excluded from another primary or secondary school covered by the scheme, that school's budget share will be increased. The amount will be determined by Regulations made by the Secretary of State.
10. The school's budget share shall be increased by the amount: -
 - D x (E/52)
 - D is the AWPU sum attributable to a registered pupil of the same age group as the pupil in question in the financial year in which the admission takes effect.
 - E is the number of complete weeks remaining in the financial year calculated from the admission date
11. These arrangements apply only in circumstances where pupils have been admitted following permanent exclusion from a school. They do not apply to any other transfer of pupils between schools taking place in year or in respect of pupils moving into an area part way through an academic year.

Funding Formulae

Formulae

12. The various formulae the Authority has developed are: -

- Activity-Led Resourcing
- Core Provision Protection
- Nursery
- Special Schools & Units
- Premises, Facilities and Grounds
- Rates
- Nursery Deduction
- Sixth Form Deduction
- Split Site Allowance
- School Meals
- New School or Planned Increases Allocation
- Admissions Authority
- Deprivation
- Special Educational Needs
- Additional Needs
- Central Teachers
- Mainstreamed Grants

These formulae are explained below.

Mainstream Schools Activity-Led Resourcing

13. The AWPU Resources are based upon a methodology of identifying activities and their costs. This process, known as “Activity-Led Resourcing” (ALR), produces the relative formula values for allocating the main pupil funding to meet delegated responsibilities.
14. The ALR model is set out in the ‘Mainstream Schools Activity Led Resourcing Model’ document with detailed notes.
15. The ALR model generates a differential pattern of resources by pupil age groups. The values within each element of the model set out the ideal structure, which will be used to guide the allocation of resources.
16. The model uses the basic class sizes for each age group, with smaller classes for certain subjects (such as Science and Technology). These class sizes are then used to calculate the basic number of teachers and other staff (and hence resources) needed by schools.
17. The model then goes on to supplement this basic allocation to ensure that each teacher has extra time to undertake a range of activities to fulfil their contractual obligations. The model covers additional activities in four main areas: -
- Curriculum Support Activities -
e.g. time required for curriculum planning and lesson preparation, development of subject specialisms, curriculum liaison with other schools.
The extra resources required for these activities are related to a number of hours per teacher.
 - Pupil Specific Activities -

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e.g. assessment, pastoral support.

The extra resources required for these activities are related to a number of hours per pupil.

- **Teacher Specific Activities -**

e.g. professional development, appraisal.

The extra resources required for these activities are related to a number of hours per teacher.

- **Management Support -**

e.g. headteacher, deputy headteacher, assistant headteacher.

The extra resources required for these activities are related to a number of hours per teacher.

18. Whilst teacher related activities are the single most important element of the ALR model, the model also takes into account several other resourcing factors. These factors are: -

- **Support Staff.** This factor covers the following types of support staff: -

- | | |
|----------------------------------|-----------------------------------|
| ➤ Teaching Assistants, | ➤ Technicians, |
| ➤ Nursery Nurses, | ➤ Finance / Administration Staff, |
| ➤ Midday Supervisors, | ➤ Site Managers. |
| ➤ Library / Resource Assistants, | |

Each of the categories of support staff is costed in the same way. A number of hours per week of non-teaching time are identified for the basic class size in each age group. The number of working weeks and the salary scale are also identified. From these factors the cost per pupil can be calculated.

- **Curriculum Costs.** This factor covers the following categories of expenditure: -

- | | |
|--|---------------------------|
| ➤ Recurrent costs
(e.g. paper, replacement books), | ➤ External exam fees, |
| ➤ Development costs
(e.g. new materials as a result of curriculum changes), | ➤ PE / Sports Facilities, |
| ➤ Large item replacement costs
(e.g. resources towards the replacement of capital equipment), | ➤ Swimming, |
| ➤ ICT replacement costs, | ➤ Educational Visits, |
| ➤ Furnishing, | ➤ Library Service, |
| | ➤ Music Service, |
| | ➤ Copyright Licences. |

The costs for each of the categories above are identified on a cost per pupil basis.

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- Administration Costs. This factor covers the following categories of expenditure: -
 - Whole school non-curriculum costs (e.g. brochures, publicity and marketing, letters),
 - Transport & interview,
 - Telephone (including replacement) and postage,
 - External charges, (e.g. bank charges, insurance)
 - Training & Development,
 - Health & Safety, (monitoring and administration costs),
 - ICT Infrastructure,
 - CRB Checks,
 - Learning & Engagement SLA.

The costs for each of the categories above are identified on a cost per pupil basis.

19. The model then uses the generated values for Teaching Staff, Support Staff, Curriculum Costs and Administration Costs to calculate the total costs per pupil for each age group. These costs are then converted into the AWPU weightings.
20. The AWPU weightings are used to allocate the AWPU resources based on each school's pupil numbers.

Core Provision Protection

(Mainstream Schools only)

21. The ALR and Core Provision Protection (CPP) resources provide schools with a base level of funding to meet delegated responsibilities. The other sub-formulae are used to direct resources to specific needs of schools.
22. The CPP model identifies the minimum level of resources a school will need to meet the basic needs of the school. The costs of the different types of staff along with the curriculum and admin non-staffing costs have been identified per class, for each year group (Year 7 only for Secondary Schools). Using this information a minimum level of resources can be calculated for each school. Where a school's AWPU Resources are not sufficient to exceed this minimum level a CPP lump sum will be allocated to that school to bring the resources up to this minimum level.
23. The CPP model is set out in the 'Mainstream Schools Core Provision Protection Model' document with detailed notes.

Nursery Resources

24. The Nursery Funding model calculates a Base Rate for the total cost per hour of providing the free entitlement and two supplements, one to enable settings to support children from deprived backgrounds and one to reflect the additional costs incurred by providers in raising and maintaining the quality of the setting.
25. Base Rate

The model has been based on a 24 place setting, which is the average size of settings in Bournemouth. The pupil learning hours has been set at 15 hours per week, with an additional allowance of 10% for planning, preparation, clearing away after the session, meeting parents, etc. Using the information from the cost survey and schools returns, the following costs were identified in the calculation of the Base Rate:

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Staffing Costs:

- Early Years Professional/Teacher, Teachers main scale point 4, 16.5 hours per week for 38 weeks
- 2 Nursery Nurses, Level 3 (APT&C scale point 17), 16.5 hours per week for 38 weeks
- Allowance for absence cover - 2% of the cost of the three staff above
- Cost of CRB checks for the three staff, including HR admin fee

Curriculum Costs:

- Learning Resources - £100 per pupil
- Staff Training - £570 per member of staff

Admin/Premises Costs:

- Admin Assistant, APT&C Scale Point 11, 15 hrs per week for 38 weeks
- Telephone, Post, Stationery, etc - £75.00 per pupil
- Premises Costs - £320.00 per pupil
- Insurance - £800.00 per setting

The above costs are totalled and then divided by 570 hours (15 hours x 38 weeks) to calculate the hourly Base Rate.

26. Deprivation Supplement

The purposes of the Deprivation Supplement are:

- To target under achievement among children from socially deprived backgrounds;
- To allocate additional funding to settings which support children from socially deprived backgrounds, to enable them to provide the additional support required so as to 'promote their opportunity to achieve at equivalent levels to other children';
- To support settings' efforts to target deprivation appropriately e.g. through specialist skills and training, additional staff and increased resources.

The Authority will be expecting the providers to use the monies they receive through the Deprivation Supplement in the following ways:

- a. For those providers where the deprivation figure is less than £1,000, a contribution towards:
 - Food - breakfast (or something to eat) for those children known not to eat anything before they arrive and/or free lunch; or
 - Clothing - spare clothes, especially coats, so they can all access the outdoors in all weathers; or
 - Nappies
- b. For those providers where the deprivation figure is greater than £1,000, use it to fund:

Funding Formulae

- additional key workers, who will have a smaller key group and work with both the children in the setting and their parents
- staff to be able to attend training such as EAL and then any associated resources they may wish to buy
- a way of working with the local CC to provide the services that will support the families - to contribute towards a family support workers time to work with the setting supporting families
- More regular outings, linked to the EYFS - there are children in Bournemouth who have never been to the beach!
- supporting children with additional needs - but not “identified” as requiring support through SEN

Officers of the Early Years Service will discuss with the providers what the Authority would like them to use the money for, prior to the start of each financial year.

The Income Deprivation Affecting Children (IDAC) Index is used to calculate the Deprivation Supplement. The IDAC Index measures the proportion of children under the age of 16 in an area living in low income households (defined as those in receipt of Income Support and Job Seekers Allowance, or in families in receipt of Working Families Tax Credit whose equivalised income excluding housing benefit was below 60% of median income before housing costs).

The Index is an area-based measure and is available down to Lower Layer Super Output Area (LSOA) (an area that covers a population of about 1,500 people). The Index shows a score for each LSOA. The LSOA for each pupil can be identified by using their postcode, taken from the termly Census.

A threshold is set at the 27th most deprived Super Output Area within Bournemouth (top quartile). Any pupil with an IDAC Index Score above this threshold is counted (whether the postcode is within Bournemouth or not). The setting will receive funding based on that child’s participation.

The Deprivation Supplement Rate has been set at 10% of the Base Rate. This percentage reflects the DfE guidance on the amount of funding for deprivation that has been included in the Dedicated Schools Grant.

27. Quality Supplement

This supplement is to be used to support and promote quality and encourage a culture of continuous improvement in the quality of provision. To qualify for this Supplement a setting must:

- Have at least a Good OfSTED Rating and be categorised good or better during the setting/LA annual review;
- Comply with the Bournemouth Quality Standard or a nationally recognised Quality Assurance Scheme (e.g. PsLA, NDNA);
- Be fully engaging in CPD for their staff; and
- Be using the Deprivation Supplement to support the most disadvantaged children in their setting.

The award of the Quality Supplement will be decided at the annual setting/LA review. If a setting subsequently achieves the required standard, the Quality Supplement

Funding Formulae

would be payable from the start of the following term. Likewise, if the quality of the setting fell below the standard required the Quality Supplement would be withdrawn from the start of the next term.

The Quality Supplement Rate has been set at 5% of the Base Rate.

Special Schools & Units Resourcing

28. The Special Schools and Units Funding Model identifies the costs involved in running a special school. The model identifies costs on two different bases: -

- Variable Costs,
- School Specific.

29. The Funding Model is set out in the 'Special Schools and Units Funding Model' document with detailed notes.

30. Variable Costs

For the variable costs, a matrix has been developed which provides a number of funding bands, with progressively increasing staffing levels to reflect increasing levels of need. For each broad type of special need for which there is special provision in the borough (Behaviour Emotional and Social Difficulties, Cognition & Learning, Communication & Interaction (Autistic Spectrum Disorder)) there is a description of the typical needs of a pupil who would require the level of support identified in each funding band.

Bands 1 and 2 cover the Throop Learning Centre functions and Band 3 covers the mainstream units' functions, to try to make the funding formula as inclusive as possible. Bands 4 to 10 cover the increasing needs of pupils in a special school and the Pupil Referral Unit. The level of resources shown in Band 3 will be allocated to schools in addition to the mainstream AWPU funding for each pupil.

The variable costs have been identified as the various types of staffing needed to teach and support the pupils. The increasing levels of this staffing reflect the complexity and severity of need of the pupils. The different types of staffing included in the matrix are:

- Teacher;
- TA general access (intended as normally in-class support, to promote access to learning and participation in the life of the school);
- TA specific programmes (to provide different types of targeted support);
- Technician;
- Instructor (swimming, dancing, singing, etc);
- Finance/Admin staff (this is the supplement to "normal" level of admin support elsewhere in the fixed costs part of the formula, and relates to the level of SEN, e.g. a student with more complex needs is likely to require much more multi-agency working and communication);
- Site Manager/Caretaker (a supplement specific to the level of SEN);
- Midday Supervisor.

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The amount of each type of staffing is calculated for each school place at that band by looking at the ratio and the number of hours in the week that are needed. A full time teacher's and instructor's week is set at 25 hours and the other posts are set at 37 hours.

Other non-staffing costs are identified for each band covering curriculum, administration and catering costs.

For each school or unit a number of places in each band will be agreed by the Authority prior to the start of the financial year. The funding for the school or unit will be based on these agreed places.

31. Fixed Costs

This element of the formula identifies different cost elements separately for a Primary Special Unit, a Secondary Special Unit, a Special School and the Pupil Referral Unit.

The fixed costs include the cost of the School Management, Finance & Admin and Site Management. It is proposed to fund these costs using a lump sum.

School Management

This section includes the costs for Headteachers, Deputy Headteachers and Assistant Headteachers. For each type of staff the scale point, number of staff and teaching load has been identified. In addition a number of FTE staff has been identified for TLR points.

Finance & Admin

This section includes the costs for Bursars and Administrative Officers. For each type of staff the spine point and number of FTE staff have been identified.

Site Management

This section includes the costs for Site Managers, Assistant Caretakers and Kitchen Supervisors. For each type of staff the spine point and number of FTE staff have been identified.

Each school will receive resources through the Lump Sum for their type of provision.

Premises, Facilities and Grounds

32. The Premises, Facilities and Grounds sub-formula generates resources to cover premises and other running costs: -

- Repairs and maintenance,
- Cleaning,
- Utility payments,
- Insurances,
- All horticultural, arboricultural and sports marking requirements

33. The resources will be allocated to the schools on the following basis: -

- Lump Sum
- Floor Area
- Net Grounds Area
- Volume of Hydrotherapy Pool

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34. Lump Sum

The Lump Sum varies depending on the age of the buildings on a school's site. The age categories and weightings are: -

Age Category	Weighting
Pre 1919	4.00
Inter War	4.00
1944 - 1966	3.50
1966 - 1976	3.00
Post 1976	1.00
Temporary	2.00

35. Floor Area

This element of the Premises, Facilities and Grounds resources is allocated on a sum per square metre of a school's floor area. The floor area of mobile classrooms is counted twice to allow for the additional costs of using mobile classrooms. The floor area for Community and Voluntary Controlled schools is weighted by 1.0338 to resource these schools for the Climate Change Levy (Foundation and Voluntary Aided Schools are exempt from paying this levy).

36. Net Grounds Area

This element of the Premises, Facilities and Grounds resources is allocated on a sum per square metre of a school's 'Net Grounds Area'. The 'Net Grounds Area' is calculated by deducting the school's total buildings footprint area (i.e. the external ground floor area) from the area of the site.

37. Hydrotherapy Pool

A school with a Hydrotherapy Pool will receive resources allocated on a sum per cubic metre of the pool.

Business Rates

(Mainstream Schools only)

38. The Rates (National Non-Domestic Rates) resources are allocated to mainstream schools on the basis of actual rates demands. As a result of legislative changes it is no longer possible to change budget shares within year.
39. The rates allocation is based on the best available information and adjusted retrospectively in the following financial year to reflect actual costs.

Nursery Deduction

40. Some elements of the Nursery Resources formulae allocate resources for premises costs. Therefore an adjustment has to be made to account for the proportion of the Premises, Facilities and Grounds Resources that relate to the Nursery Classes.
41. The resources calculated using the Premises, Facilities and Grounds sub-formula and the Business Rates sub-formula are reduced in line with the proportion of Nursery pupils to the total pupils in the school.

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Sixth Form Deduction

42. The Learning and Skills Council allocate resources to schools with sixth forms. Therefore the Authority's Funding Formula does not allocate delegated resources to these schools for their sixth form pupils. However, because some elements of the formulae allocate resources based on school size and age, an adjustment has to be made to account for the proportion of these resources that relate to the sixth form.
43. The resources calculated using the Premises, Facilities and Grounds sub-formula and the Business Rates sub-formula are reduced in line with the proportion of sixth form pupils to the total pupils in the school.

Split Site Allowance

44. The Split Site sub-formula compensates schools that operate on more than one site on the basis of a sum per FTE pupil.
45. A school is deemed to be a split site if it satisfies both of the following criteria: -
 - the school operates on at least two sites,
 - the sites are separated by a public highway.

School Meals

46. This formula consists of the following two elements:
 - Free School Meals - the resources are distributed to mainstream schools based on free school meals eligibility, as recorded on the School Census for the January preceding the financial year. This data is checked with the data held by the Student Awards Team to ensure that it is collected and checked in a consistent manner.
 - A lump sum is allocated to all schools to support the Standards Fund Resources available for the improvements in the quality of meals and the reintroduction of hot meals in primary schools.

New School or Planned Increases Allocation

47. The New School or Planned Increases sub-formula applies to new schools or schools with planned increases of 15% or more. These resources are to cover the initial costs involved with setting up new year groups.
48. The resources are allocated as a lump sum per new class. The lump sum is based on the Mainstream ALR Model, lines 129 to 133 multiplied by the Basic Class Size. The lump sum is an average of the year groups for Primary and Secondary Phases.

Admissions Authority Factor

49. This sub-formula allocates resources to governing bodies of schools which are admission authorities, to meet admission and admission appeals costs.

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50. If a governing body is an admission authority the school will receive a lump sum for the first form of entry plus a smaller lump sum for each additional form of entry.

Deprivation Factor

(Mainstream Schools only)

51. The Deprivation Factor uses the Income Deprivation Affecting Children (IDAC) Index and pupils' postcodes, taken from the School Census for the January preceding the financial year, to allocate resources to schools to provide additional support for deprived pupils.
52. A threshold is set at the 27th most deprived Super Output Area within Bournemouth (top quartile). Any pupil with an IDAC Index Score above this threshold is counted (whether the postcode is within Bournemouth or not), with their IDAC Index Score as their weighting. The resources are allocated using the total weighted pupils for each school.

Special Educational Needs Factor

(Mainstream Schools only)

53. The Special Education Needs (SEN) Inclusion sub-formula allocates resources to schools primarily to cover the additional needs of pupils at the School Action and School Action Plus levels of intervention of the SEN Code of Practice.

54. Nursery Units

Each school with a Nursery Class will receive a lump sum to cover transience in nursery admissions. The remaining resources will be allocated on the number of pupils at school action or above in respect of SEN.

55. Primary Schools- Infant Classes

This factor uses the latest 2 years Foundation Stage Profile results, plus the average of the two years data as a proxy indicator for the Reception year. Pupils with a score below 60 are counted. The resources for this element will be allocated to each school on the basis of these average results.

56. Primary Schools- Junior Classes

This factor uses the latest 4 years National Curriculum Key Stages 1 results for English and Mathematics. The English Reading and Writing results are averaged and added to the Mathematics results at each level. The results are weighted at each level attained, below Level 2.

The weightings are: -

Level	Weighting
Working Towards	3
Level 1	2

The resources for this element will be allocated to each school on the basis of a sum per weighted pupil.

57. Secondary Schools

This factor uses the latest 5 years National Curriculum Key Stages 2 results for English and Mathematics. The results are weighted at each level attained, below the Level 4.

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Where the results are not available, e.g. the pupil was absent for the test, the Teacher Assessment Score is used.

The weightings are: -

Level	Weighting
Working Towards	4
Level 1	3
Level 2	2
Level 3	1

The resources for this element will be allocated to each school on the basis of a sum per weighted pupil.

Additional Needs Factor

(Mainstream Schools only)

58. This sub-formula allocates resources to schools for the additional costs incurred for Mobile and EAL pupils. The data for Mobility and EAL will be taken from the School Census for the January preceding the financial year. The definitions for this data is:

“Mobility is the number of additional pupils admitted in a school between the two January School Census dates preceding the financial year, excluding normal admissions. Normal admissions are classified as pupils admitted between the start of the autumn term and 30 September in the first year group of the school.”

“EAL is the number of pupils admitted in a school between the two January School Census dates preceding the financial year, where English is not their first language.”

59. The additional costs incurred for a Mobile pupil and an EAL pupil are not the same, therefore the following weightings are used:

Pupils	Weighting
Mobile	1.00
EAL	2.00

60. The resources are allocated to each school based on the total number of weighted Mobile and EAL pupils.

Central Teachers Resources

61. Certain schools have taken on the responsibility of providing services to the other schools in the Town, which were previously provided by the LA. These services are: EMTAS, Learning Support and Behaviour Support.
62. The schools providing these services will receive a Lump Sum.

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Mainstreamed Grants Resources

63. The DfE mainstreamed a number of grants into the DSG for the 2011/2012 financial year. The Schools' Forum decided to allocate the resources using the formulae previously used to distribute the grants, where this was allowed under the Financing Schools (England) Regulations 2011.
64. School Standards Grant
A lump sum per school, plus a sum per pupil.
65. School Standards Grant (Personalisation)
Sum per pupil, plus sum per pupil eligible for Free School Meals, plus sum per pupil with low prior attainment.
66. School Development Grant (Main and Post -LIG Deprivation)
Previous year's resources per pupil multiplied by the pupils for the current year.
67. Specialist Schools
The same cash value as the 2010/2011 grant.
68. School Lunch Grant
All schools that provide a hot meal service receive a lump sum for each kitchen, plus a sum per pupil.
69. Ethnic Minority Achievement Grant
Lump sum per school, plus a sum for each child registered as English not being their first language.
70. 1-2-1 Tuition
The same cash value as the 2010/2011 grant.
71. Extended Schools
Allocated to each school on the basis of the total of the pupils' Income Deprivation Affecting Children (IDAC) Index Score. Using each pupil's postcode the IDAC Score for the Lower Super Output Area (LSOA) in which they live can be identified. The 27th ranked LSOA in Bournemouth (top quartile) is set as the threshold and any pupil's IDAC Score which is greater than this threshold is counted. Plus a lump sum, a sum per child eligible for free school meals and a sum per Looked After Child.
72. Primary National Strategy Grants
Sum per FTE pupil, plus sum per pupil with a score below 60 on the EYFS Profile.
73. Secondary National Strategy Grants
Lump sum per school, plus a sum per pupil with low prior attainment.

Funding Formulae

74. Diploma Formula Grant

Allocated on the number of pupils taking Diplomas and the type of Diploma.

Minimum Funding Guarantee / Damping

75. The Minimum Funding Guarantee (MFG) is a statutory element of the funding formula, required by the DfE. The Guarantee ensures that no school loses more than 1.5% per pupil on the previous year's resources.
76. A Guaranteed Funding Level (GFL) is calculated for each school by multiplying the resources per pupil the school received in the previous year by -1.5%, and then multiplying by the pupil numbers from the latest January School Census.
77. Where a school's Delegated Resources fall below the GFL for the school, a lump sum is allocated to bring the resources up to the GFL.
78. Where a school's Delegated Resources are above the GFL for the school, a proportion of the resources above the GFL are deducted to pay for those schools in receipt of the MFG.