

Appendix - Growth fund model applicable from Sept-19
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Key	School census date: Start of Academic year	DSG Financial Year										
		FYI only		Yr1	Yr2	Yr3	Yr4	Yr5	Yr6	Yr7		
		2017/18	2018/19	2019/20	2020/21*	2021/22	2022/23	2023/24	2024/25	2025/26		
		Oct-16	Oct-17	Oct-18	Oct-19	Oct-20	Oct-21	Oct-22	Oct-23	Oct-24		
		Sep-17	Sep-18	Sep-19	Sep-20	Sep-21	Sep-22	Sep-23	Sep-24	Sep-25		
A		14,786	15,044	15,075		15,165	15,210	15,210	15,210	15,210		
A1	Primary Pupil no.s	actual census count estimated census count census growth from previous year % of previous years local growth applied to MSOA growth for the following year *MSOA growth from previous year * Local growth (new classes required for this no. of pupils) local growth equivalent no. of new classes (FYI only)			258	31	90	45	45	-		
				145%	82%	75%	75%	75%	-	-		
				349	172	135	68	45	-	-		
				240	210	180	90	60	-	-		
				8	7	6	3	2	-	-		
B	Secondary Pupil no.s	actual census count estimated census count census growth from previous year % of previous years local growth applied to MSOA growth for the following year *MSOA growth from previous year * Local growth (new classes required for this no. of pupils) local growth equivalent no. of new classes (FYI only)			10,553	10,655	10,899	11,079	11,289	11,529		
B1					102	245	90	105	240	240	120	
					287%	100%	100%	100%	100%	100%	100%	
					134	345	180	210	240	240	120	
					0	120	180	210	240	120	60	
					0	4	6	7	8	4	2	
C	DfE unit funding rate	ACA adjustment applied Primary per pupil Secondary per pupil Secondary compared to primary ratio			1.003	1.003	1.003	1.003	1.003	1.003	1.003	
D		£1,375	£1,375	£1,375	£1,375	£1,375	£1,375	£1,375	£1,375	£1,375	£1,375	
E = A * C	DfE Calculated Growth fund	Primary		£480,766	£236,458	£185,000	£95,000	£60,000	-	-	-	
F = B * D		Secondary		£276,611	£708,677	£370,000	£430,000	£495,000	£495,000	£245,000	£125,000	
		total			£757,376	£945,135	£555,000	£525,000	£555,000	£495,000	£245,000	£125,000
G	Growth fund awarded			£1,190,000	£1,190,000	£945,135	£555,000	£525,000	£495,000	£245,000	£125,000	
H = E + F + G	Any local movement within DSG allocations			(£500,000)	(£470,000)	£45,869	-	-	-	-	-	
	Final budgetted growth fund											
	C1	Primary per pupil		£3,023	£3,039	£3,039	£3,039	£3,039	£3,039	£3,039	£3,039	
	D1	Local growth funding rates*	Secondary per pupil	£3,900	£3,959	£3,959	£3,959	£3,959	£3,959	£3,959	£3,959	
			Secondary compared to primary ratio	30.3%	30.3%	30.3%	30.3%	30.3%	30.3%	30.3%	30.3%	
Current Growth funding methodology	E1 = C1 * A1	Growth funding forecast *	Primary *		£553,659	£509,036	£349,487	£220,329	£75,976	-	-	
	F1 = D1 * B1		Secondary *		£277,148	£613,684	£781,952	£900,729	£950,220	£673,073	£336,536	£168,268
	H1 = E1 + F1	Total Growth forecast £			£830,806	£1,122,720	£1,131,439	£1,121,058	£1,026,196	£673,073	£336,536	£168,268
	i1 = H1 - H	overspend / (underspend)			£110,806	£131,716	£576,439	£596,058	£471,196	£178,073	£91,536	£43,268
	i1 cumulative	Cumulative overspend / (underspend)			£110,806	£242,522	£818,961	£1,415,020	£1,886,215	£2,064,288	£2,155,824	£2,199,092
	J	*Required % saving Primary			38.6%	38.6%	38.6%	38.6%	38.6%	38.6%	38.6%	38.6%
	K	applied Secondary			44.1%	44.1%	44.1%	44.1%	44.1%	44.1%	44.1%	44.1%
Revised growth funding methodology to be affordable to the DfE DSG allocation*	M = E1 - (E1 * J) + F1 - (F1 * K)	Revised growth fund forecast (based on % reduction)			£850,232	£651,696	£638,790	£577,822	£376,248	£188,124	£94,062	
	N = M - H	Revised overspend / (underspend)			£110,806	(£140,772)	£96,696	£113,790	£22,822	(£118,752)	(£56,876)	(£30,938)
	N cumulative	Revised Cumulative overspend / (underspend)			£110,806	(£29,966)	£66,730	£180,520	£203,342	£84,589	£27,713	(£3,225)
	C2 = C1 - (C1 * J)	Primary per pupil			£1,866	£1,866	£1,866	£1,866	£1,866	£1,866	£1,866	£1,866
	D2 = D1 - (D1 * K)	Revised local growth funded unit rates	Secondary per pupil		£2,213	£2,213	£2,213	£2,213	£2,213	£2,213	£2,213	£2,213
			Secondary compared to primary ratio		18.6%	18.6%	18.6%	18.6%	18.6%	18.6%	18.6%	18.6%
	C2 * 30	Equivalent annual funding to support a new class	Primary		£55,979	£55,979	£55,979	£55,979	£55,979	£55,979	£55,979	£55,979
	D2 * 30		Secondary		£66,397	£66,397	£66,397	£66,397	£66,397	£66,397	£66,397	£66,397
FYI only	NFF local AWPU Rate	Primary (Years R - 6)			£2,757	£2,757	£2,757	£2,757	£2,757	£2,757	£2,757	£2,757
		Secondary (KS3 - Year 7 - 9)			£3,876	£3,876	£3,876	£3,876	£3,876	£3,876	£3,876	£3,876
		Secondary compared to primary ratio			40.6%	40.6%	40.6%	40.6%	40.6%	40.6%	40.6%	40.6%

* MSOA "Middle Super Output area" - defined by office for the national statistics and school postcode information. Schools are categorised into MSOA population area's and only positive growth within that area is counted

* Local growth (new classes required for this no. of pupils) - as agreed by the School Admissions team and please note this can only ever be best estimate up until the Sept intakes are confirmed

* Current local growth funded rates - are according to the 17/18 local funding formulae AWPU base line rate for primary and secondary, simply uplifted with the applied MFG protection under the NFF for 2018/19 continuing into 2019/20

* Note therefore - 2020/21 and onwards are forecast estimates for planning purposes only.

* MSOA growth from previous year - is heavily caveated that this is again, best estimates for forecasting purposes for future years. Final Oct census no.s of each year, and what would fall into MSOA growth is subject to a number of variations outside of the planned school class growth alone. This Model will therefore be updated each year, once the DfE have supplied the actual growth fund for the following financial year. To maintain and review level of accuracy with the forecasts.

* Growth funding forecast applicable for maintained schools is 7/12's of the year only, as there core funding is applied and updated from April. Academies funding is applies from Sept, so hence why a full years growth is applied.

* Required % reduction saving on current growth distribution to be affordable to the DfE DSG allocation - which would be applicable from Sept-19. The appendix has been modelled on scenario 2 (the recommended option)

* Revised growth funding methodology - allows in year overspends on growth that will be recovered in the following year, as the funding is lagged

* Model scenarios, the Education Board, could choose to apply the required saving reductions to existing rates on alternative % reductions for both primary and secondary, but this is provided the model itself is still affordable over the 7 years. However, it should remain noted that given the growth for future years is now in the secondary years. Any greater weighted ratio saving applied to the primary provision has a greater impact on the funding to be applied per class in a primary school, than the corresponding increase in funding for a secondary class. Therefore scenario 2 is the recommended option, as this ensures a primary school will receive at least £55,000 to support the DSG revenue funding for a new class. And a secondary school £65,000.

** Please also note - it is recognised no inflation has been applied to the local funded rates at this time. This will therefore be linked to any inflation the DfE apply to their funded unit rates. And at this time - no assumptions can be made for inflation.