

Dudley Metropolitan Borough Council

Schools Forum

7 February 2006

Report of the Director of Children's Services

Distribution of Funding Earmarked For Personalised Learning

Purpose of Report

1. To advise Schools Forum of the DfES criteria in respect of Personalised Learning and to propose a funding methodology in respect of the 2006/07 LMS formula (Local Management of Schools).

Background

2. Since the last meeting of Schools Forum the DfES has announced the targeted funding for 2006/07 and 2007/08; this funding is within the Dedicated Schools Grant.
3. There will be two funding streams under personalised learning - Key Stage 3 (KS3) and Primary. The allocations for Dudley are shown in Table 1.

Table 1 – Dudley Allocations for Personalised Learning

Targeted Funding Details	2006/07 £	2007/08 £
Primary Personalised Learning	716,000	929,000
KS3 Personalised Learning	826,000	1,487,000

4. **Key Stage 3 Personalised Learning** funding was announced as part of the White Paper, *Higher Standards, Better Schools For All*. This has been distributed as follows: 50% on the basis of low prior attainment; 15% on the basis of pupil numbers aged 11 to 15; and 35% on the basis of deprivation, as measured by the numbers of children in families on income support.

This funding will need to be allocated via the fair funding formulae.

In relation to Key Stage 3, the DfES priorities are:

- a. First, to provide additional support for pupils who have fallen behind age related expectations, especially English and maths;
- b. Second, to fund provision for gifted and talented children; and
- c. Third, to help children from deprived families to access after school and year round activities through the development of extended schools.

5. **Primary Personalised Learning.** The funding will be distributed on the same basis as KS3 funding (*paragraph 4*), but using pupil numbers age 5 - 10 instead of age 11-15. DfES priority for this funding is in support of personalisation, including access to extended services at primary level.
6. All targeted funds under the theme of Personalised Learning will be distributed from April 2006 in accordance with the school finance regulations and related guidance. Furthermore, they will be shown as a separate formula factor within the S52 budget statement, in order that schools can identify the amount distributed.
7. Although the Personalised Learning funding will not be ring fenced there is increasing pressure from the DfES to account for any funding allocated in respect of deprivation factors; this is highlighted further in DfES correspondence dated 22 December 2005. A further report will be presented to Schools Forum: Social Deprivation and Personalised Learning, highlighting the background to the DfES correspondence.
8. In order for the funds to be allocated to schools via the delegated budget for 2006/07, members of Schools Forum will need to advise the Director of Children's Services on the most appropriate methodology for the allocation of funds to schools. Three options are presented for consideration in Table 2 for KS3 and Table 3 for Primary phase.
9. The DfES have confirmed that they expect that schools already adopt a heavily personalised approach to teaching and learning for pupils with statements of special educational need, therefore priority would be expected to be given to pupils without statements in mainstream schools. However this is a local decision for the Local Authority and Schools Forum. Based on this advice, pupils with statements of special educational need have been excluded from the finance model attached at Appendix A.

Table 2 – Options for Distribution of Personalised Funding – KS3

% of Funding	DfES Priority	2006/07 £000	Proposed Allocation Methodology
50%	Pupils who have fallen behind age related expectations	413	Under- attainment in English & Maths at KS2
15%	Gifted and talented children	124	Un-weighted pupil numbers
35%	Children from deprived families to access after schools and year round activities.	289	Either: Un-weighted Free School Meals; Or Index of Multiple Deprivation (IMD) top 20% Super Output Areas; Or Index of Multiple Deprivation (IMD) top 30% Super Output Areas
100%		826	

Table 3 – Options for Distribution of Personalised Funding – Primary

% of Funding	DfES Priority	2006/07 £000	Proposed Allocation Methodology
50%	Pupils who have fallen behind age related expectations	358	Under- attainment in Reading, Writing & Maths at KS1
15%	Gifted and talented children	107	Un-weighted pupil numbers
35%	Children from deprived families to access after schools and year round activities.	251	Either: Un-weighted Free School Meals; Or Index of Multiple Deprivation (IMD) top 20% Super Output Areas; Or Index of Multiple Deprivation (IMD) top 30% Super Output Areas
100%		716	

- a. Under attainment. The data which drives this element of the proposed formula factor is already available and used to allocate funding under 'SEN without Statements' formula factor. The data relates to the 2005 Statutory Assessment Tests (SATs) in respect of pupils educated in Dudley Schools where levels of attainment at SATs are measured as significantly below average;
- b. Un-weighted pupil numbers. DfES define gifted and talented as the top 5% of the school's cohort. It is proposed therefore that this formula element is allocated across all pupils, on an un-weighted basis;
- c. Un-weighted Free School Meals. The data which drives this element of the proposed formula factor is already available and used to allocate funding under 'SEN without Statements' and 'Socio Economic Need' formula factors.

or:

Index of Multiple Deprivation (IMD) -Super Output Areas (SOAs). SOAs are a set of boundaries created for the collection and publication of statistics. There are 32,482 SOAs in England and 202 in the Dudley Borough. The IMD is built up of a number of indicators chosen as the preferred statistical measures for each factor of deprivation, for example, number of adults and children in income support households. Pupils in Dudley schools residing in the top 20% (or 30%) of the SOAs have been identified and funds allocated accordingly to each school.

Appendix A provides the financial models in respect of the data shown in Tables 2 and 3.

11. This DfES targeted funding for personalised learning relates to mainstream pupils only.
12. At the Budget Working Group meeting on 18 January 2006, colleagues recommended acceptance of model C (Super Output Areas 30%). The SOA of 30% is in line with the DfES criteria used for conducting phase 2 of the Children's Centres review and using the same data would provide consistency.

Proposals

13. It is proposed that Schools Forum consider the financial modelling in respect of the allocation of Personalised Learning for 2006/07 and 2007/08 and advise the Director of Children's Services of a preferred option from Tables 2 and 3, noting that Budget Working Group recommended model C in respect of the 30% IMD factor.

Finance

14. The funding of schools is prescribed by the DfES through School Finance (England) Regulations 2006.
15. From 1st April 2006, the Schools Budget will be funded by a direct DfES grant: Dedicated School Grant (DSG).

Law

16. Councils' LMS Schemes are made under Section 48 of the School Standards and Framework Act 1998. The Education Acts 1996 and 2002 also have provisions relating to school funding.

Equal Opportunities

17. The Council's Equal Opportunities Policy is taken into account when considering the allocation of resources.

Recommendation

18. That Schools Forum note the contents of this report, and advise the Director of Children's Services in respect of the distribution of Personalised Learning funding for 2006/07 and 2007/08 as set out in the proposals.



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