



Primary and Secondary School Revenue Funding Guidance 2023/24 Financial Year

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Dedicated Schools Grant (DSG)

On 16th December 2022 the Department for Education (DfE) published the DSG allocations for 2023/24. Full details can be found on the DfE website at the following link:

<https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-2023-to-2024>

There have been minimal changes to the National Funding Formula (NFF) for 2023/24 which are summarised below:

- Baselineing of the 2022 to 2023 schools supplementary grant into the NFF
- Uplifting the minimum per pupil values by the supplementary grant's basic per-pupil values, and an additional amount which represents the average amount of funding schools receive from the FSM6 and lump sum parts of the grants
- Increasing NFF factor values (on top of the amounts added for the 2022/23 schools supplementary grant).

Further to these changes, as part of the continued move towards a direct NFF, local authorities are required to move their local formula closer to the NFF. Cambridgeshire have previously attempted to align with the NFF as closely and as such the required changes do not have a significant impact on the current approach.

The only additional condition the Cambridgeshire local formula will be required to meet in 2023/24 is to move factor values at least 10% closer to the NFF.

As in previous years since the introduction of the National Funding Reforms the DSG is calculated based on 4 notional blocks. The actual amount to be received by the local authority during the 2023/24 financial years is subject to change and will be amended to reflect recoupment for academies. The initial 2022/24 allocations for Cambridgeshire are set out in the table below, which also provides for comparison the 2022/23 allocations:

DSG Block	2022-23 Allocation £m	2023-24 Initial Allocation £m	Difference to 2021-22 Allocation £m	% Change
Schools Block (incl. growth, NNDR & 22-23 supplementary grant)*	434.048	452.820	+18.772	+4.3%
High Needs Block	94.360	104.277	+9.917	+10.5%
Central Services Schools Block	5.923	5.563	-0.359	-6.1%
Early Years Block	38.454	40.711	+2.257	+5.9%
Total	572.785	603.371	+30.587	+5.3%

*Please note: The 2022-23 Schools Block figures above includes supplementary grant funding which has now been baselined into main allocations for 2023/24.

The uplift to Cambridgeshire's Schools Block allocation is as a result of a combination of the additional investment through the national funding formula and the net increase in pupils between October 2021 and October 2022.

Early Years Block indicative figures are currently based on January 2021 data. Adjustments expected to 2022/23 figures based on actual take-up on receipt of the January 2022 census.

Allowing for the 1% block transfer from Schools Block to High Needs Block and the centrally retained growth fund the total available for distribution (including business rates) is **£446.592m**. The final draft allocations and funding formula unit values therefore reflect this position and was approved by the Children and Young Peoples (CYP) Committee on 17th January 2023.

Formula Funding Factors

As part of the continued move towards a direct NFF local authorities must use all mandatory NFF factors in their local formula and are no longer allowed to use additional factors (such as looked after children). As noted above, local authorities must also move their local formula factors at least 10% closer to the NFF values. To assist with meeting this requirement the Education and Skills Funding Agency (ESFA) have provided minimum allowable funding levels which must be met. Details of all the funding factors applied are listed below with the 2023/24 Cambridgeshire values shown in **Appendix 1**. The ESFA is responsible for calculating the funding formula allocations for academy schools on an academic year basis, applying the factors and values agreed locally. Therefore, any figures published by the local authority are for illustrative purposes only and final allocations may differ on receipt of the General Annual Grant (GAG) statement from the ESFA.

Please Note: The data received from DfE shows only % of pupils who qualify for each factor. As such we are unable to provide information at individual pupil level. Due to the use of % rather than whole pupil numbers the funding amounts are unlikely to be exact multiples of the unit values.

1. **Basic entitlement** - A compulsory funding factor that assigns funding to individual pupils, with the number of pupils for each school or academy based on the October pupil census. (In some instances where new schools are continuing to fill to capacity pupil numbers will be adjusted to reflect the anticipated increase from September.)

The funding is allocated according to an age-weighted pupil unit (AWPU). A single rate for primary age pupils, and differential rates for key stage 3 and key stage 4.

2. **Deprivation** – use a combination of free school meals (FSM) and the Income Deprivation Affecting Children Index (IDACI). Free school meals is measured at both the previous October census and “ever 6” – the number of pupils entitled to free school meals at any time in the last 6 years. The IDACI measure uses a range of bands and different values can be used for each band. There may be separate unit values for primary and secondary.

The 2023/24 funding formula, as in the previous year, uses IDACI 2019 ranks to group each lower super output area (LSOAs, an area with typically about 1,500 residents) into one of six bands of decreasing deprivation. The table on the following page shows how the bands are defined.

IDACI data	Ranks	Band
Pupils in the most deprived 2.5% of LSOAs	1 to 821	A
Pupils in the next 5% most deprived LSOAs	822 to 2463	B
Pupils in the next 5% most deprived LSOAs	2464 to 4105	C
Pupils in the next 5% most deprived LSOAs	4106 to 5747	D
Pupils in the next 10% most deprived LSOAs	5748 to 9032	E
Pupils in the next 10% most deprived LSOAs	9033 to 12316	F

3. Prior attainment – acts as a proxy indicator for low level, high incidence special educational needs.

- primary pupils identified as not achieving the expected level of development in the early years foundation stage profile (EYFSP)
- secondary pupils not reaching the expected standard in KS2 at either reading or writing or maths

Since 2017 to 2018, the DfE has weighted the low prior attainment (LPA) factor for some secondary year groups so that those who have sat the more challenging KS2 tests introduced in the 2015 to 2016 academic year do not have a disproportionate influence within the total for the low prior attainment factor in the mainstream formula.

In 2023/24, the DfE has carried forward the weightings it used in 2022/23 for the year 7 to year 10 cohorts, so they will apply to the year 8 to year 11 cohorts respectively. For the financial year 2023 to 2024, the weightings are:

- pupils in year 7 to 9 inclusive in October 2022: 54%
- pupils in year 10 in October 2022: 65%
- pupils in year 11 in October 2022: 64%

Following the cancellation or incompleteness of assessments in summer 2020 and summer 2021 due to coronavirus (COVID-19), local authorities will not be able to use this data as part of setting a low prior attainment factor in local funding formulae. Instead, local

authorities will use 2019 assessment data as a proxy for assessments which would have taken place in 2020/21.

4. **English as an additional language (EAL)** - Pupils identified in the October census with a first language other than English attract funding for 3 years after they enter the statutory school system. Local authorities must now use 3 years as an indicator for providing funding to these pupils, in line with the department's methodology.
5. **Pupil mobility** - allocates funding to schools with a high proportion of pupils with an entry date in the last three years which is not typical. (For year groups 1 to 11, 'typical' means that the first census on which a pupil is recorded as attending the school (or its predecessors) is the October census. 'Not typical' means that the first census a pupil is recorded as attending the school is a January or May census. For the reception year, 'typical' means the first census is October or January.)

Rather than relying on a single census, this mobility methodology, introduced last year, involves tracking individual pupils using their unique pupil ID through censuses from the past 3 years. If the first census when the pupil was in the school was a spring or summer census, they are a mobile pupil. This excludes reception pupils who start in January. This methodology also excludes pupils who joined in the summer term after the summer census, or pupils who joined in October before the autumn census.

In light of the cancellation of the May 2020 census, pupils who joined a school between January 2020 and May 2020 attract funding for mobility based on their entry date, rather than by virtue of the May school census being their first census at the current school. This change will be reflected in the APT and ensures that the factor continues to operate in as similar a way as possible to what it would have done if the May census had not been cancelled.

6. **Sparsity** – A school is eligible for sparsity funding in the NFF if:
 - a. its sparsity distance is equal to or above the main distance threshold, or above the tapered distance threshold, and
 - b. the average year group size (calculated as the APT-adjusted pupil count divided by number of year groups present at the school) is below the relevant size threshold

Phase	Size threshold: maximum average number of pupils per year group	Main distance threshold: minimum average distance to second nearest compatible school	Distance taper threshold: minimum average distance to second nearest compatible school
Primary	21.4	2 miles	1.6 miles
Secondary	120	3 miles	2.4 miles
Middle	69.2	2 miles	1.6 miles
All-Through	62.5	2 miles	1.6 miles

In the NFF, schools' allocations are tapered according to average year group size, so that the smaller the school the greater the allocation. Schools with a sparsity distance equal to or greater than the main distance threshold (2 or 3 miles) and an average year group size of less than or equal to half the year group threshold receive 100% of the sparsity funding for their phase.

- 7. Lump sum** - Local authorities can set different lump sums for primary and secondary (middle schools receive a weighted average based on the number of year groups in each phase).

Where schools amalgamate, they will retain 85% of the total lump sums in the year after the amalgamation (or in the same year if they amalgamate on 1 April) instead of receiving just a single lump sum immediately. Local authorities may apply to vary the additional payment in exceptional circumstances.

Where schools amalgamate after 1 April, the new school will receive funding equivalent to the formula funding of the closing schools added together for the appropriate proportion of the year and will receive the 85% allocation in the following year.

Local authorities may apply for an exceptional factor to pay a further allowance to amalgamating schools in the second year after amalgamation. Local authorities may also wish to apply to exclude the exceptional factor payment from the MFG baseline.

- 8. Split sites** - An optional factor applied by Cambridgeshire. The purpose of this factor is to support schools which have unavoidable extra costs because the school buildings are on separate sites. Allocations must be based on objective criteria (**Appendix 2**), both for the definition of a split site and for how much is paid.
- 9. Business Rates** – We understand from the ESFA that at least 2 local billing authorities have opted out of the nationally administered process whereby business rates would be paid by the ESFA directly to billing authorities on behalf of all maintained schools and academies. As such the national process will not be applied for maintained schools in 2023/24.

For academies the process and treatment of business rates should be no different to current practice.

The figures in the draft budgets show the indicative business rate figures for 2023/24 as provided by the ESFA, these should be disregarded by academies as rates bills will continue to be paid directly.

Figures for maintained schools reflect the amounts they will receive as part of the funding formula allocation for 2023/24, and include adjustments to reflect differences between budget allocations and actual costs for 2022/23.

We are aware that a number of schools premises have been revalued and as such rates bills from April 2023 are likely to increase. Where this is the case maintained schools will

continue to pay rates bills directly and any differences between the notional amount funded and actual cost will be retrospectively funded in the 2024/25 budgets. Should this result in cashflow issues for individual maintained primary schools they should discuss with their Schools Financial Adviser in the first instance.

10. Private Finance Initiative (PFI) contracts - An optional factor applied by Cambridgeshire. The purpose of this factor is to support schools which have unavoidable extra premises costs because they are a PFI school and/or to cover situations where the PFI “affordability gap” is delegated and paid back to the local authority.

Allocations must be based on objective criteria, capable of being replicated for any academies in the authority area.

11. London fringe – A compulsory factor for the five local authorities to which it applies (Buckinghamshire, Essex, Hertfordshire, Kent and West Sussex). Does **not** apply to Cambridgeshire.

12. Exceptional premises factors – An optional factor applied in Cambridgeshire. Local authorities can apply to ESFA to use exceptional factors relating to premises. The exceptional factors must relate to premises costs and applications should only be submitted where the value of the factor is more than 1% of a school’s budget and applies to fewer than 5% of the schools in the authority’s area.

Protections

Minimum Funding Guarantee

The Minimum Funding Guarantee (MFG) applies to pupils in age ranges 5-16 and therefore excludes funding for early years children and young people over 16. In 2023/24 local authorities will be able to set a MFG between +0.0% and +0.50% per pupil. Following discussions at Schools Forum and confirmation of the available distribution total the amount applied within the Cambridgeshire formula for 2023/24 is **+0.50%**. It is important to remember MFG is a per-pupil protection and will therefore **not** support schools with falling rolls.

Minimum Per-Pupil Levels

Alongside the MFG the DfE have introduced the mandatory minimum per-pupil levels (MPPL's). For 2023/24 the MPPL's will be set at **£4,405** for primary schools and **£5,715** for secondary schools.

The MPPL is calculated on total school funding (excluding premises costs) divided by the number of pupils. If a schools funding is below the nationally prescribed MPPL they receive an allocation to bring them to the 2023/24 minimum.

Capping of Gains

Local authorities can continue to choose to cap any gains schools receive through the local formula to support overall affordability. Capping and scaling must be applied on the same basis to all schools. Based on the overall available Schools Block for Cambridgeshire no cap on gains is required for 2023/24.

Growing or New Schools

Where schools are growing to meet basic need for places additional funding may be available from the growth fund. The growth fund is retained from the overall distribution total prior to budget setting and applies to maintained and academy schools.

The Growth Fund can only be used to:

- support growth in pre-16 pupil numbers to meet basic need
- support additional classes needed to meet the infant class size legislation. (Please note: The growth fund is not used for this purpose within Cambridgeshire due to the overall cost.)
- meet the cost of new schools. (Pre-opening and diseconomies funding as prescribed in the New Schools Funding Policy.)

The Growth Fund **may not** be used to support schools in financial difficulty.

Where a new school (other than a free school) is opening, the regulations require local authorities to estimate the pupil numbers expected to join the school in September and fund, accordingly, again explaining the rationale underpinning the estimates.

The regulations also require local authorities to estimate pupil numbers for all schools and academies, including free schools, where they have opened in the previous seven years and are

still adding year groups. Estimates may be adjusted each year to take account of the actual pupil numbers in the previous funding period.

The criteria for Growth funding, as approved by Schools Forum in November 2022, can be seen at **Appendix 3**.

Redetermination of budget shares

It is not permissible to make an in-year redetermination of schools' budget shares for pupils aged 5-16, other than in the explicit circumstances allowed for within the school finance regulations, which relate to:

- sixth form funding
- early years funding
- reallocation of funding for excluded pupils
- rates

De-delegated services

Funding for de-delegated services must be allocated through the formula but can be de-delegated for maintained mainstream primary and secondary schools with Schools Forum approval. De-delegation is not an option for academies, special schools, nurseries or PRUs.

The table below shows the methodology approved by Primary School representatives on Schools Forum in respect of de-delegations to be applied to maintained primary schools in 2023/24:

	2022/23 Basis	2023/24 Basis
Contingency	£2.10 per pupil	£2.10 per pupil
Free School Meals Eligibility	£4.65 per FSM child	£4.65 per FSM child
Maternity / Paternity	£5.00 per pupil	£5.00 per pupil
Trade Union Facilities Time	£1.10 per pupil	£1.10 per pupil

De-delegation arrangements for schools converting to academy status are as follows:

- conversion date on or before 1 April 2023 – no de-delegation
- conversion date between 2 April 2023 and 1 September 2023 – local authority retains any de-delegated funding until 1 September 2023
- conversion date between 2 September 2023 to 21 March 2024 – local authority retains any de-delegated funding until 31 March 2024

After the dates specified, the academy will receive the full formula allocation and ESFA will recoup this from the local authority. The local authority should continue to provide the services to new academies where funding is de-delegated, if they are asked to do so. If the local authority is unable to provide the requested service, we expect the local authority and the academy to come to an arrangement to pay the funding directly to the academy. Exceptions to this would be in cases where contractual arrangement to pay services in advance have already been made, and the local authority does not have the ability to continue to provide this service.

Functions for Maintained Schools

As in previous years local authorities can fund some services relating to maintained schools only from maintained school budget shares, with the agreement of maintained school members of the schools forum. The relevant maintained schools members of the schools forum (primary, secondary, special, and pupil referral units (PRUs)) should agree the amount the local authority will retain.

The agreed amount for Cambridgeshire continues to be **£10 per pupil**.

As with de-delegations, the amount to be held by the local authority will be determined after MFG has been applied. If a school converts to academy status, ESFA will recoup the amount retained for that school from the local authority's DSG for the remaining months of the financial year that the school is an academy. The academy will be reimbursed in its monthly general annual grant (GAG) payment from the point of conversion.

Unlike for de-delegated services, there will be no phased transfer of funding following conversion so there will be immediate recoupment of this part of the budget. For example, if a school converts on 1 January 2024 (three months prior to the end of the financial year), ESFA will recoup three twelfths of the retained amount relating to that school.

Other Revenue Funding:**High Needs Pupils**

Primary and Secondary schools are required to contribute £6,000 towards the assessed need for every High Needs pupil, with the LA providing Top-Up funding for the assessed need exceeding £6k.

Please Note: Where a pupil is from another Local Authority the Top-Up payment will be made directly to the school from their home authority. Schools may therefore need to contact the home authority in order to receive the funding due.

The authority is required to calculate notional SEN budgets for mainstream schools and academies. The notional SEN budget is to cover the first £6,000 of all pupils SEN needs, both Low Costs High Incidence and High-Cost Low Incidence. The notional SEN budget is calculated as follows:

- 6.00% of Basic Per Pupil Entitlement
- 10.00% of FSM and FSM6 Funding in Primary Sector and Secondary Sectors
- 75.00% of IDACI Deprivation Funding in Primary Sector and Secondary Sectors
- 45.00% of Prior Attainment Funding in Primary Sector and Secondary Sectors

Where a school has a Specialist or Enhanced Resources Base on site the funding for the pupils in this provision will be funded separately through the Place-Plus methodology.

High Needs Contingency

Methodology for 2023/24 to be confirmed

Maintained Nursery Class Funding

Where schools have maintained nursery classes, they will be funded through the Early Years Single Funding Formula (EYSFF). Initial budgets will be calculated based on estimated hours for each term and adjustments made on receipt of the census information collected in May, October and January.

The hourly Cambridgeshire funding rates for 2023/24 are:

- Funded two-year-olds - **£6.12** (increased from £5.78)
- Funded three and four-year-olds - **£4.63** (increased from £4.37)
- Early Years Pupil Premium (EYPP) will be funded at per 62p per hour per eligible child (increased from 60p)
- Disability Access Fund (DAF) will be funded at £828 to per eligible child per year (increased from £800).

Further information will be provided once the initial funding allocations have been calculated.

Pupil Premium

The government has recently announced that pupil premium rates will increase for the financial year 2023/24.

<https://www.gov.uk/government/publications/pupil-premium/pupil-premium>

Pupil Premium rates per pupil for 2023/24:

Type of pupil	Pupil Premium per pupil
Pupils in year groups reception to year 6 recorded as Ever 6 free school meals (FSM)	£1,455
Pupils in years 7 to 11 recorded as Ever 6 FSM	£1,035
Looked-after children (LAC) defined in the Children Act 1989 as one who is in the care of, or provided with accommodation by, an English local authority	£2,530
Children who have ceased to be looked after by a local authority in England and Wales because of adoption, a special guardianship order, a child arrangements order or a residence order (Post LAC)	£2,530
Pupils in year groups reception to year 11 recorded as Ever 6 service child or in receipt of a child pension from the Ministry of Defence	£335

Please note:

- 1) *A pupil cannot receive both Ever 6 FSM pupil premium and LAC pupil premium, if they are eligible for both the School will receive the LAC pupil premium as opposed to the Ever 6 FSM pupil premium. The DfE update their allocations in December to account for this which may cause a change in your pupil premium numbers compared to initial allocations.*
- 2) *Where a pupil is from another Local Authority the LAC pupil premium payment will be made directly to the school from their home authority. Schools may therefore need to contact the home authority in order to receive the funding due.*

Mainstream Schools Additional Grant (MSAG)

The 2022 Autumn Statement announced that the core schools budget will increase by £2 billion in the 2023 to 2024 financial year, over and above totals announced at the Spending Review 2021.

In the 2023 to 2024 financial year, mainstream schools will be allocated additional funding through the mainstream schools additional grant (MSAG) 2023 to 2024. This is in addition to schools' allocations through the schools national funding formula.

<https://www.gov.uk/government/publications/mainstream-schools-additional-grant-2023-to-2024>

Initial indicative figures for Cambridgeshire suggest an allocation of circa £15m. Indicative figures have been shared with schools to assist with budget setting and finalised allocations of the school level grant allocations will be published by the ESFA in spring 2023.

Funding will be based on the national funding rates uplifted by the area cost adjustment:

Factor:	Base Rate:
Basic primary per pupil rate:	£119
Basic KS3 per pupil rate:	£168
Basic KS4 per pupil rate:	£190
FSM6 (primary) per pupil:	£104
FSM6 (secondary) per pupil:	£152
Lump Sum:	£4,510
Cambridgeshire Area Cost Adjustment (ACA)	1.0286

Initial indicative figures for Cambridgeshire suggest an allocation of circa £15m. Estimated figures have been shared with schools to assist with budget setting and finalised allocations of the school level grant allocations will be published by the ESFA in spring 2023.

PE and Sport Premium

The DfE are yet to update the guidance and conditions of grant for 2023/24, but the 2022/23 information can be found at:

<https://www.gov.uk/guidance/pe-and-sport-premium-for-primary-schools>

Allocations for the academic year 2022 to 2023 are calculated using the number of pupils in years 1 to 6, as recorded in the January 2022 census, as follows:

- schools with 17 or more pupils receive £16,000 plus £10 per pupil
- schools with 16 or fewer pupils receive £1,000 per pupil

The premium must be spent by schools on making additional and sustainable improvements to the provision of PE and sport for the benefit of all pupils to encourage the development of healthy, active lifestyles.

Universal Infant Free Schools Meals

The DfE are yet to update the guidance and conditions of grant for 2023/24, but the 2022/23 information can be found at:

<https://www.gov.uk/government/publications/universal-infant-free-school-meals-uifsm-2022-to-2023>

Each meal currently taken by an eligible pupil attracts £2.41, and it is assumed a pupil will take 190 school meals over an academic year, providing £457.90 per eligible pupil.

Recovery Premium

The recovery premium is a time-limited grant providing over £300m of additional funding for state-funded schools in the 2021 to 2022 academic year and £1bn across the 2022 to 2023 and 2023 to 2024 academic years.

<https://www.gov.uk/government/publications/recovery-premium-funding/recovery-premium-funding>

The 2022-23 allocations will be calculated on a per pupil basis, based on the following rates:

- £145 for each eligible pupil in primary schools
- £276 per eligible pupil in secondary schools

For other eligible schools, including special education units in mainstream schools, the rate is double the mainstream rate:

- £290 per pupil in primary education
- £552 per pupil in secondary education

The DfE have included a minimum payment to ensure that:

- an eligible primary school will not receive less than £2,000
- an eligible secondary school will not receive less than £6,000

As with pupil premium, the funding for looked-after children will be paid to the local authority and be managed by the virtual school head.

National Tutoring Programme

On 31 March 2022, the Department for Education (DfE) announced plans to simplify the programme for the 2022 to 2023 academic year. These plans involve providing £349 million of core tutoring funding directly to schools and giving them the freedom to decide how best to provide tutoring for their pupils.

Further details can be found at:

<https://www.gov.uk/government/publications/national-tutoring-programme-guidance-for-schools-2022-to-2023>

State-funded schools and academy trusts in England will receive £202.50 per pupil for 60% of their pupils that are eligible for pupil premium, from year 1 to year 11. The number of pupils will be rounded to the nearest whole number.

In recognition of higher costs, non-mainstream schools, including special schools and units, will receive £529 per pupil for 60% of pupil premium pupils. The number of pupils will be rounded to the nearest whole number.

Homes for Ukraine

Funding has been allocated to support the provision of education and childcare for children ages 2 to 18 who have entered via the Homes for Ukraine visa route only.

Further details can be seen at:

<https://www.gov.uk/government/publications/homes-for-ukraine-education-and-childcare-funding>

The funding is based on arrival dates of young people by quarter, not start date at school. As such the data is complex and funding will not always directly align.

Separate guidance will be circulated in respect of the methodology applied in Cambridgeshire.

Contacts and Queries

Further guidance and useful information can be accessed on the Schools Finance page at:

<https://www.cambslearntogether.co.uk/cambridgeshire-services-to-schools/cambridgeshire-schools-finance>

If you have any further queries or questions on the general funding formula, please email:

schools.funding@cambridgeshire.gov.uk

Appendix 1 – Funding Formula Unit Values 2023/24

NFF Factor		Cambridgeshire Funding Formula (NFF) Unit Rates 2022-23	National Funding Formula (NFF) Unit Rates 2023-24 (with ACA applied)	Minimum Allowable 2023-24 Values	0.9860 Draft Cambridgeshire Unit Rates 2023-24 (Weighting Applied)	£ Increase compared to 22/23	% Increase compared to 22/23
Basic per pupil entitlement (AWPU)	AWPU: Primary	£3,217	£3,438	£3,352	£3,390	£173	5.37%
	AWPU: Secondary KS3	£4,536	£4,847	£4,725	£4,779	£243	5.35%
	AWPU: Secondary KS4	£5,112	£5,462	£5,326	£5,386	£274	5.36%
Deprivation (based on ever 6 free school meal numbers)	FSM current - Primary	£470	£486	£474	£479	£9	2.00%
	FSM current – Secondary	£470	£486	£474	£479	£9	2.00%
	Ever6 FSM – Primary	£590	£714	£696	£704	£114	19.34%
	Ever6 FSM – Secondary	£865	£1,043	£1,017	£1,029	£164	18.92%
	Primary IDACI F	£220	£233	£227	£230	£10	4.41%
	Primary IDACI E	£270	£284	£277	£280	£10	3.57%
	Primary IDACI D	£420	£446	£435	£439	£19	4.63%
	Primary IDACI C	£460	£486	£474	£479	£19	4.21%
	Primary IDACI B	£490	£517	£504	£509	£19	3.95%
	Primary IDACI A	£640	£679	£662	£669	£29	4.55%
	Secondary IDACI F	£320	£339	£331	£335	£15	4.55%
	Secondary IDACI E	£425	£451	£439	£444	£19	4.57%
	Secondary IDACI D	£595	£628	£612	£619	£24	4.07%
	Secondary IDACI C	£650	£689	£672	£679	£29	4.48%
	Secondary IDACI B	£700	£739	£721	£729	£29	4.15%
Secondary IDACI A	£890	£942	£918	£929	£39	4.36%	
English as an Additional Language	Primary	£565	£587	£573	£579	£14	2.52%
	Secondary	£1,530	£1,585	£1,546	£1,563	£33	2.16%

Primary and Secondary School Revenue Funding Guidance – 2023-24

Low Prior Attainment	Primary	£1,130	£1,170	£1,141	£1,154	£24	2.08%
	Secondary	£1,710	£1,773	£1,728	£1,748	£38	2.21%
Pupil Mobility	Primary	£925	£957	£933	£944	£19	2.03%
	Secondary	£1,330	£1,377	£1,343	£1,358	£28	2.12%
Lump Sum	Primary	£121,300	£129,646	£126,405	£127,836	£6,536	5.39%
	Secondary	£121,300	£129,646	£126,405	£127,836	£6,536	5.39%
Minimum per pupil funding Primary		£4,265			£4,405	Weighting not applied to MPPL	
Minimum per pupil funding Secondary (KS3 and KS4 combined)		£5,525			£5,715	Weighting not applied to MPPL	

Notes to the Table:

- a) The values for sparsity are not included in the table above as are variable up to a new maximum of £56,300 for primary schools and £81,900 for secondary schools.
- b) Equally the DfE recognises that some factors cannot easily be allocated on a formulaic basis and under the NFF continue to be funded at historical or actual funding levels. This covers the premises factors which includes PFI, split site (increased to £110k) and business rates for those schools affected.

Appendix 2 – Split Site Funding

The Department for Education (DfE) guidance on acceptable criteria for accessing additional funding are shown below:

Examples of acceptable split sites criteria, together with possible payment methodologies, are set out below and are intended to help local authorities formulate a clear and transparent split site policy. It is unlikely that a local authority would need to incorporate all the proposed criteria or funding methodologies into its own policy.

A school will qualify for split sites funding if:

- *The sites are at least X metres / kilometres / miles apart as the crow flies and the sites are separated by a public highway.*
- *The provision on the additional site does not qualify for an individual school budget share through the Dedicated Schools Grant or the Local Authority budget.*
- *The school has remote playing fields, separated from the school by at least X kilometres / miles and there is no safe walking route for the pupils.*
- *X% of staff are required to teach on both sites on a daily basis in order to support the principle of a whole school policy and to maintain the integrity of the delivery of the national curriculum.*
- *At least x% of pupils are taught on each site on a daily basis.*

Split sites funding will be payable to all schools and recouperment academies which meet the criteria.

Schools sharing facilities are not eligible for split site funding.

Federated schools are not eligible for split site funding.

The split site factor does not apply to remote provision for sixth forms. Split site funding will be calculated as follows:

- *A lump sum payment of £x*
- *£x per pupil*
- *£x per square metre of the additional site*

In each case, values for primary and secondary schools may be different.

There may be one rate of payment for the first additional site and a separate rate for each additional site.

Payment rates may be stepped, for example as the distance between sites increases.

APPROVED CAMBRIDGESHIRE CRITERIA FOR ACCESSING SPLIT SITE FUNDING

Within the 2023-24 Cambridgeshire local formula a school will qualify for split site funding if:

- The sites are at least **1 mile** apart as the crow flies and the sites are separated by a public highway.
- Split site funding will be calculated on the basis of a lump sum payment of **£110,000** to all qualifying schools.

At the present time the only school qualifying for this funding would be Hardwick Primary on the basis that they also operate the additional campus in Cambourne.

Appendix 3 – Growth Fund Policy

1.0 INTRODUCTION

- 1.1 The following guidance provides details of the methodology for the local distribution for growth and new schools funding during the 2023/24 financial year approved by Schools Forum at the meeting held on 14th December 2022.
- 1.2 As per the Education & Skills Funding Agency (ESFA) School Revenue Funding 2023 to 2024 Operational Guide the Growth Fund can only be used to:
- support growth in pre-16 pupil numbers to meet basic need
 - support additional classes needed to meet the infant class size legislation. (Please note: The growth fund is not used for this purpose within Cambridgeshire due to the overall cost.)
 - meet the cost of new schools. (Pre-opening and diseconomies funding as prescribed in the New Schools Funding Policy.)
- 1.3 The Growth Fund must **not** be used to support:
- schools in financial difficulty: any such support for maintained schools should be provided from a de-delegated contingency
 - general growth due to popularity; this is managed through lagged funding
- 1.4 The Growth Fund may not be the most appropriate source of funding for growing schools, and the local authorities should use varying pupil numbers where there is a more permanent and significant change to numbers, and where it's appropriate for the change to be reflected in the funding formula (such as new schools growing to capacity or changes to age range).
- 1.5 As such, the Growth Fund is ring-fenced so that it is only used for the purposes of supporting growth in pupil numbers to meet **basic need** in both maintained schools and Academies. Any growth or expansion due to parental preference/popularity will **not** be eligible to be funded from the Growth Fund.
- 1.6 Local Authorities (LAs) are required to propose the criteria on which any growth funding is to be allocated to Schools Forum for approval. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid. The LA will also need to consult Schools Forum on the total sum to be retained and must update Schools Forum on the use of the funding. It is essential that the use of the Growth Fund is entirely transparent and solely for the purposes of supporting growth in pupil numbers.

2.0 FALLING ROLLS FUND

- 2.1 LAs may also set aside Schools Block funding to create a small fund to support schools with falling rolls, where local planning data shows that the surplus places will be needed within the next three financial years. However, as there is a mandatory requirement that *“Support is available only for schools judged Good or Outstanding at their last Ofsted inspection”*, Forum have previously taken the view that it was not appropriate to apply such a factor.

- 2.2 Although we recognise a number of schools have experienced falling rolls over the last 12-18 months the current forecast data does not provide evidence these surplus places will be required to meet Basic Need requirements in the next three years.

3.0 PROPOSED GROWTH FUND PROCESS AND CRITERIA 2023/24

- 3.1 Following feedback from schools and discussions at the Schools Forum meeting on 4th November the agreed approach for 2023/24 removes the requirement for schools to submit an application to access growth funding.
- 3.2 **Process** - The approach for 2023/24 will take a more formulaic approach alongside the latest Place Planning information on planned expansions and requests for schools to operate additional classes to meet basic need in their area. As such the following process will be followed:
- 1) On receipt of the October 2022 census current forecasts and local knowledge will be used to identify schools where there is planned or potential growth expected from September 2023.
 - 2) Where this forecast / expected growth is in excess of 15 pupils in Primary or 25 pupils in Secondary an initial view will be taken as to:
 - a. Whether the growth is due to basic need?
 - b. Whether the school would need to reorganise / employ additional teachers to accommodate the increase in pupils?
 - 3) If the question to both of these is “Yes” these schools would be identified as potentially qualifying for growth funding.
 - 4) An initial list of potentially qualifying schools would be shared with the Growth Panel (which would continue to comprise of LA and Head Teacher representatives) for comment.
 - 5) Those schools identified as potentially qualifying for growth funding will be notified alongside the 2023/24 budget information in late January / early February, although additional funding would not be confirmed at this stage.
 - 6) The information / forecasts would continue to be refined as revised pupil numbers / admissions data becomes available with initial proposals shared with schools in March/April.
 - 7) Revised figures would be then produced after the relevant secondary and primary offer days prior to final sign-off from the Growth Panel.
 - 8) Qualifying schools would be notified in May and funding allocated in September 2023.
 - 9) In instances where numbers were still inconclusive, the Growth Panel would reserve the right to defer a final decision until the start of the 2023-24 academic year.
 - 10) In the event of exceptional circumstances which were not identified as part of the initial process, schools would have the opportunity to contact the appropriate place planning officer via Clare.Buckingham@cambridgeshire.gov.uk and discuss their individual circumstances.
- 3.3 **Principles** - The following principles will continue to be applied in assessing the eligibility of schools to access additional funding:
- Where the predicted numbers for a **Primary** or Secondary School (excluding nursery classes and Post-16) for the following September show an increase, due to

basic need, requiring the running of additional classes and/or significant restructure the school may be able to access additional funding.

- Where schools have chosen to admit above their Published Admissions Number (PAN) to meet parental preference from outside of their agreed planning area (**not** basic need), they will **not** be eligible to receive funding from the Growth Fund in recognition that the LA could have secured places for the children concerned at other schools.
- Where schools take the decision to extend their admission arrangements to give priority to children attending or in the catchment area of an out-of-county or out-of-area school, they will not be eligible to receive Growth Funding for the pupils concerned.
- In instances where the LA has specifically requested a school to expand to take an additional class to create capacity, but the forecast numbers do not represent the need for an additional class, schools may be able to claim additional funding. The funding will only be payable if the school is unable to reorganise its class teaching structure to meet the request.
- Where the LA has not specifically requested a school to operate an additional class, the school maybe be required to provide evidence that an additional class or tutor group and/or significant restructure would be required to meet basic need.
- A class is defined as “additional” if it requires a change in the school’s current or historical class organisation or number of classes. In Primary schools this may result in mixed year teaching where numbers dictate and this is seen as the most prudent option for the organisation of the school as a whole.
- Schools that have historically operated mixed-age classes or have a PAN in a multiple of less than 20 would be normally expected to operate some mixed-age classes. (The Growth Fund cannot be used to reduce class sizes.)
- The requirement for additional classes or forms of entry will be reviewed on a case-by-case basis. Funding will be allocated based on the requirement for additional support / classes / forms of entry.

3.4 **Funding** - Allocations will be calculated at the following rates:

Phase	Academic Year	Financial Year (7/12ths)
Primary (1FE)	£56,700 + £4,000	£33,075 + £4,000
Secondary (1FE)	£68,250 + £4,000	£39,813 + £4,000

- **Please note:** Pro-rata allocations will be made where 0.5FE is deemed appropriate. The allocations include a £4,000 (pro-rata) allowance towards the cost of equipment, fixtures and fittings to set up a new classroom. Once agreed these amounts are guaranteed irrespective of actual pupil numbers to allow schools to staff appropriately.
- As noted above, no funding adjustments will be made in respect of “missing” pupils in Key Stage 1.
- Funding will be guaranteed for the year for which it was agreed, i.e. no clawback will be applied. However schools should be mindful that if numbers do not materialise (and are therefore not recorded on the October census) this may impact on funding for future years.
- Funding for maintained schools is only guaranteed for the financial year to which it relates. Future years funding will be assessed annually during the budget setting process.
- Where the LA has requested maintained schools to run an additional class and numbers do not materialise, funding to recognise the difference will be provided to compensate for the 5/12th period April to August. This will be calculated on the basis of 5/12th of the academic year Growth Fund allocation less the basic entitlement received for pupils in the additional class based on the October census.

3.5 **Other Considerations**

- The level of revenue balances for maintained schools and academies will be requested and considered as part of the application process. Any school with a revenue balance deemed as excessive would **not** be permitted to claim the full value of the additional growth funding. These instances will be reviewed on a case-by-case basis.
- New schools which are no longer funded via guaranteed variations to pupil numbers, but are still growing to capacity will be subject to the process and principles set out above. However, recognition will be given to the uncertainties in pupil numbers for such schools supporting new communities, and as such decisions may need to be taken outside of the timescales applied to more established schools.

3.6 **Academies** will take account of the additional guidance in **Appendix A** and be subject to the same criteria as above with the following additions and amendments:

- Where an academy is expanding due to parental preference rather than basic need the academy can bid directly to the ESFA, rather than being funded from the LA Growth Fund.
- Any funding allocated would be for the full academic year as original funding is based on the previous October Census. This would be subject to confirmation of actual funded numbers from the ESFA and would be calculated on receipt of the October Census at the start of the new academic year.

DfE additional guidance states:

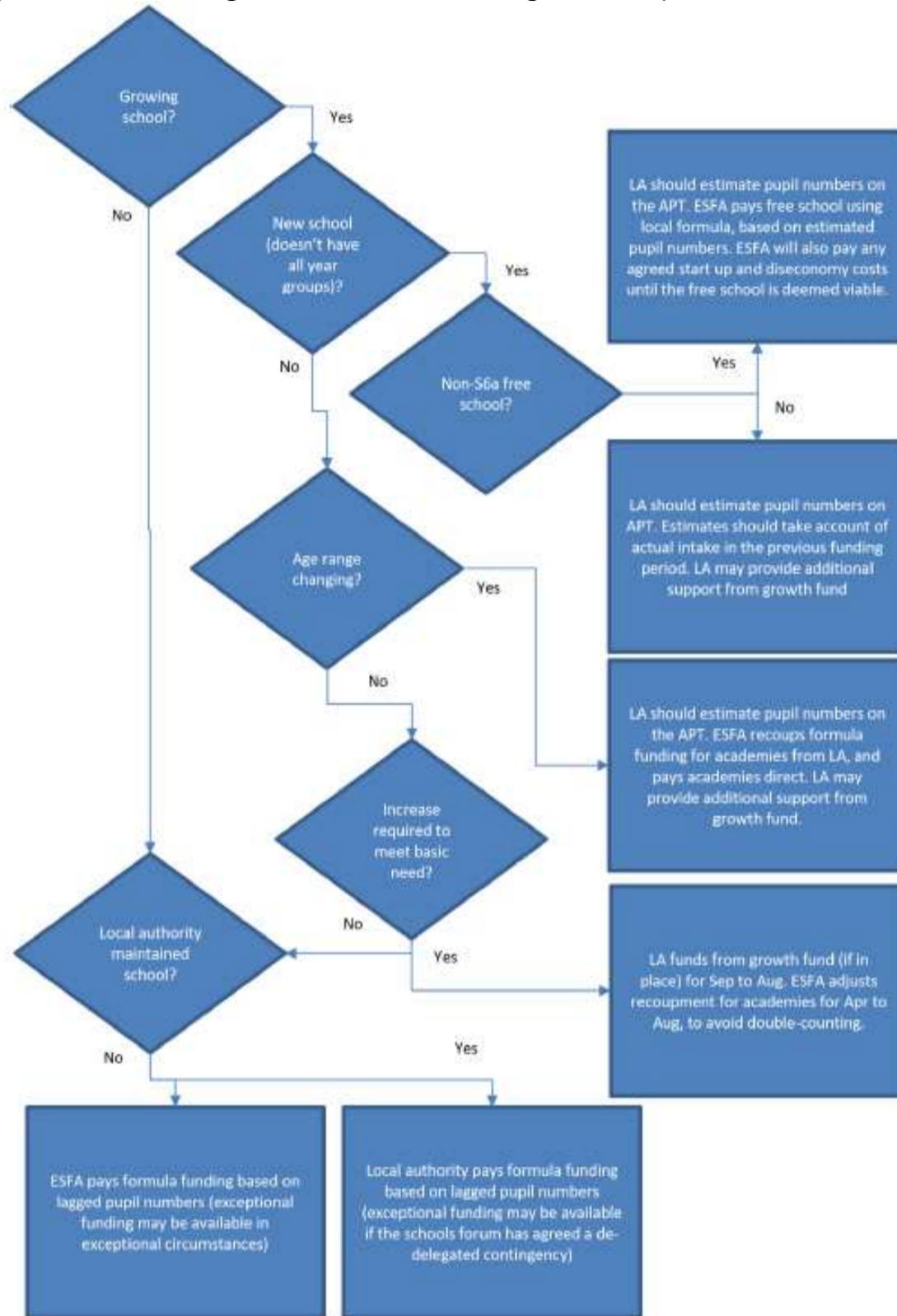
“Where academies are funded on estimates, however, there is no need for them to access the growth fund for this purpose. This is because they will receive additional funding through a pupil number adjustment for actual numbers. We will identify academies funded on estimates in the January edition of the APT. Around 90% of former non-recoupment academies are funded on estimates.”

4.0 NEW SCHOOL FUNDING CRITERIA 2023/24

- 4.1 Where a new school is due to open, the regulations require that LAs should estimate the pupil numbers expected to join the school in September and fund accordingly, explaining the rationale underpinning the estimates. Under these regulations, LAs should estimate pupil numbers for all schools and academies, including free schools, where they have opened in the previous seven years, and are still adding year groups. LAs can adjust estimates each year, to take account of the actual pupil numbers in the previous funding period. For academies an allocation of funding is recouped from each LA and, following formula replication by the EFSA, an annual grant allocated.
- 4.2 There is an increasing requirement from the DfE/ESFA to guarantee / underwrite pupil numbers for new schools planned to be opened in future years. Although this is effectively the approach already applied for new schools, it does increase the risk should actual pupil numbers not reflect the current forecasts.
- 4.3 Due to the way in which schools funding is allocated from the DfE on a lagged basis (including additional funding for growth) this results in the existing schools within the county effectively having to subsidise all new schools whilst they fill to capacity and move to being funded on actual numbers. Therefore, the greater the differential between the actual numbers on roll at new schools as at the October Census and the guaranteed number to be funded, the greater the required subsidy and impact on all other schools.
- 4.4 Current practice has been to open new schools on the following basis:
- Primary schools – guaranteed funding for a minimum of 30 or 60 pupils in the first year of opening dependent on whether they are opening from reception up or for all year groups.
 - Secondary schools – guaranteed funding based on the planned capacity **only** if the initial pupil forecasts support this. For example, a 4FE secondary school with forecast numbers of between 90 and 120 in year 1 would be funded for 120 guaranteed places. If the forecast numbers are below 90 the guaranteed number would be adjusted to reflect the closest multiple of 30.

- Guaranteed pupil numbers for the second year of operation onwards have been based on actual and forecast numbers following annual discussions.
- 4.5 The DfE have recently consulted on the future arrangements for the National Funding Formula – Fair funding for all. As part of this consultation funding for growth and new schools is under review with proposals to change the way in which this funding is allocated, including the funding of start-up costs. *“We propose that, when a hard NFF is implemented, funding for growth, new and growing schools, and falling rolls will still be allocated, as these will all continue to be important parts of the lagged funding system. However, the method through which this funding is allocated should change – moving to a new, national approach.”* Until this new approach is confirmed the LA are unable to provide any long-term commitments to funding arrangements as they will be subject to the outcomes of the national policy changes.
- 4.3 Alongside the main formula funding, pre-opening costs and diseconomies funding in respect of new basic need academies are also payable from the Growth Fund. Details of the current amounts payable can be found in the New Schools Funding Policy (**Appendix B**), which is also subject to approval on an annual basis.
- 4.4 This funding must be made available to new basic need academies on the same basis as maintained schools, including those funded on estimates – the only exception is that the ESFA will continue to fund start-up and diseconomy costs for new free schools where they are not being opened to meet an identified basic need requirement as referred to in section 6A of the Education and Inspections Act 2006.
- 5.0 AMENDMENTS TO FUNDING CRITERIA**
- 5.1 It is possible to amend the above Growth Fund criteria during the year where this becomes necessary; however, the revised criteria must be submitted to the ESFA for compliance checking and must also be approved by Schools Forum before the revised criteria can be implemented.

Appendix A – Funding Flow Chart for Growing Schools (from EFSA Guidance)



Appendix B – New School Funding**Pre-Opening Funding for New Schools**

The pre-opening funding is intended to cover all revenue costs up to the opening of the school. Capital costs to secure and develop the school's site, and ICT to support the curriculum, are funded separately for the LA's five year rolling programme of capital investment. Books and other curriculum materials may be purchased before opening, using an advance of the post-opening diseconomies funding.

The pre-opening funding is to cover:

- project management (support to coordinate all work leading to the development of the school);
- staff recruitment (including the Head teacher/Principal);
- salary costs (which often include the Head teacher/Principal, Finance/Business Manager and administrative support in advance of opening);
- office costs.

Primary Schools - funding is calculated on the basis of 1 term prior to the date of opening.

Secondary Schools - funding is calculated on the basis of 2 terms prior to the date of opening.

Special Schools - funding is calculated on the basis of 2 terms prior to the date of opening.

In all instances the funding can be accessed earlier on request, but the total amount to be received remains as detailed below.

Primary	£50,000
Secondary	£150,000
Special	£130,000

Post-Opening Diseconomies Funding**Resources –**

Paid annually as the school builds up to capacity –

- £125 for each new mainstream place created in the primary phase (years R to 6)
- £500 for each new mainstream place created in the secondary phase (years 7 to 13)

New places will be calculated annually based on the increases in roll from year to year.

Leadership –

Paid annually based on the number of year-groups that the school will ultimately have. The amount paid to mainstream schools with pupils aged 4 – 15 each year is set out below:

Year	1	2	3	4	5	6	Total
Primary	£40,250	£33,750	£27,000	£20,250	£13,500	£6,250	£141,500
Secondary	£125,000	£93,500	£62,500	£31,000			£312,000

Appendix 4 – Areas for Consideration When Setting Budgets

1. Staff pay as percentage of total expenditure

Staff pay is the single most expensive item in the school budget. It typically represents over 70% of expenditure. The [schools financial benchmarking service](#) will help with analysis.

Questions governors might want to ask:

- what percentage of the budget is spent on staffing compared with similar schools?
- how does the percentage for teaching staff, curriculum support staff and other support staff compare with other similar schools?
- how do your school's pupil outcomes – such as your school's progress score – compare with other similar schools, relative to spend on staffing?
- What is the overall staff cost as a percentage of total income? Staffing costs over 80% of total income are considered high
- if teaching costs are relatively high, is this due to the number of teachers or a relatively high proportion of highly-paid staff?

2. Average teacher cost

This measure is calculated by dividing the total teaching cost by the full-time equivalent (FTE) number of teachers.

Questions governors might want to ask:

If the average teacher cost is high in comparison with other similar schools, why is this? The [schools financial benchmarking service](#) includes staffing cost per teacher (in the 'expenditure' section).

Is this due to:

- the staffing grade profile, such as a high number of staff on the upper pay scale?
- the responsibilities structure in the school, such as the Teaching and Learning Responsibility (TLR) scale?
- another reason?

How far is your school using its pay flexibilities – for example, to differentiate pay by teachers' performance?

3. Pupil-to-teacher ratio (PTR)

The pupil-to-teacher ratio (PTR) is calculated by dividing the number of FTE pupils on roll by the total number of FTE teachers. A relatively low PTR could suggest small class sizes.

As well as benchmarking the PTR, you may want to review the average PTR and pupil to adult (teachers and support staff) ratios in other schools and academies. You can do this using the 'Workforce' section of the [schools financial benchmarking service](#) and choosing 'pupils per measure'.

The ratio of pupils to all educational staff (including teaching assistants) is also relevant, especially in primary schools.

Questions governors might want to ask include:

- what is the PTR for different key stages within their schools?
- how does the school's PTR compare with similar schools? If it's significantly different, what is the reason for this?
- how does the ratio of pupils to staff compare with similar schools?

4. Class sizes

The smaller the class size the greater the cost of delivery per pupil. Governors should ensure that class size plans are affordable while supporting the best outcomes for pupils.

Questions governors might want to ask:

- what are the average class sizes by key stage, and by options at key stages 4 and 5?
- what class sizes does your school aim to achieve – and what is the educational reason for this?
- are there any small classes where the per pupil funding does not cover the cost of delivery? This can be especially important at key stage 4 and 5 where class sizes for some subjects can fall
- do you know the maximum average class size that the school can operate at within the context of the pupil admissions, the structure of the building, the numbers in different year groups and the need for intervention strategies?

5. Teacher contact ratio

This measure is calculated by taking the total number of teaching periods timetabled for all teachers in the school and dividing that by the total possible number of teaching periods (the number of teaching periods in the timetable cycle multiplied by the FTE teachers). All teachers should have a guaranteed minimum of 10% timetabled planning, preparation and assessment (PPA) time. Therefore the teacher contact ratio will always be lower than 1.0.

Questions governors might want to ask:

- how would changes to the teacher contact ratio impact on the overall budget?
- are teaching staff undertaking roles that could be done by support staff?
- how does your school compare against the ASCL aspirational target (secondary schools only)? What is the reason for any difference?

6. Proportion of budget spent on the leadership team

Schools have many different leadership and management structures and comparisons are not straightforward. The total number of staff in the leadership group (FTE) is included in the [schools financial benchmarking service](#).

Some schools calculate the cost of non-class-based leadership time as a percentage of total expenditure, and compare to similar schools by collaborative exchanges of summary information. Likewise, multi-academy trusts can compare across their member schools where they are similar.

Questions governors might want to ask:

- how does this compare with similar schools, taking into account any contact time the leadership staff have?
- if there is more than one school in your trust or federation, are the leadership structures proportionally the same?
- how has your school made decisions on the proportion of its budget to be spent on the leadership team?
- if this is relatively high or low compared with similar schools, is this because of the size of the leadership team, or their pay?

7. 3 to 5 year budget projections

Governors should ask to see 3 to 5 year financial projections, and the assumptions made to cost them.

Assumptions you may want to review include:

- projected pupil numbers
- free school meal numbers
- estimate additional grant income (pupil premium etc)
- projections of the staffing that will be necessary in these years.

Schools should plan their staffing based on multi-year projections of curriculum needs.

Questions governors might want to ask:

- how confident are you that pupil number projections are realistic? If there is uncertainty, boards should be given 3 scenarios: cautious, likely, and optimistic. This applies to all key assumptions, but especially pupil number projections and funding rate assumptions
- if the optimistic scenario indicates financial difficulties, is the school developing a recovery plan now?
- if the cautious budget indicates potential financial difficulties, what contingency plans does the school have to overcome them?
- are there any issues in the medium term that should be addressed now?
- how will current decisions impact medium-term budgets?
- what do we need to put in place now to ensure we have the necessary funding in the future?

8. Spend per pupil for non-pay expenditure lines compared to similar schools

The [schools financial benchmarking service](#) will allow you to compare your school's pattern of expenditure with similar schools.

Questions governors might want to ask:

- what is the spend per pupil for catering, ICT, estates management, business administration, energy and curriculum supplies?
- if benchmarking indicates a relatively high spend on a particular expenditure line, do you know why?
- are the reasons unavoidable or can your school secure greater efficiency?
- if the cost of energy seems high compared with similar schools, have you considered switching your energy deal or provider?
- if spend on supplies and services seems high compared to similar schools, are there opportunities for collaborating with other local schools to bring costs down?

Multi-academy trust (MAT) trustees may also want to compare their level of 'top slice' to other MATs, what it is used for, and how it provides value for money for member academies.

9. School improvement plan priorities and the relative cost of options

The budgetary process sits firmly within the strategic leadership framework, and should link into the overall management and planning cycle, rather than being seen as an additional activity that is the responsibility of the finance manager.

Questions governors might want to ask:

- are school improvement initiatives prioritised, costed, and linked to the budget?
- are all new initiatives fully costed before your school is committed to the proposal?

10. List of contracts with costs and renewal dates

Each year your school must review its contracts for all of its services to check which ones are due for renewal. Check that contracts are good value for money (VFM) and meet the school's needs.

Questions governors might want to ask:

- are all contracts due for renewal re-tendered/reviewed for VFM before renewal?
- are there any regular payments for services that are an invoice-only contract? Include all goods and services on a contracts list, including single-item and routine purchases, such as stationery. Check all suppliers are on contracts list, and review the overall list for value for money (VFM)
- are all contracts for the supply of goods and services captured and reviewed regularly on an up-to-date register?