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# SCHOOL FUNDING AND FINANCE



Jill Gould – March 2024

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# NOT AS CONFUSING AS IT MAY SEEM



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# WHAT AFFECTS THE SCHOOL'S SPENDING

## PUPIL NUMBERS DRIVE YOUR FUNDING

Pupil Numbers  
Drives your funding

Staffing  
Staff training  
ECT's  
Maternity  
Salaries  
Pay grades

Resources  
Areas of concern after Inspection  
OFSTED or review  
New initiatives

Assets  
Replacement?  
IT  
Asset register dates of purchase

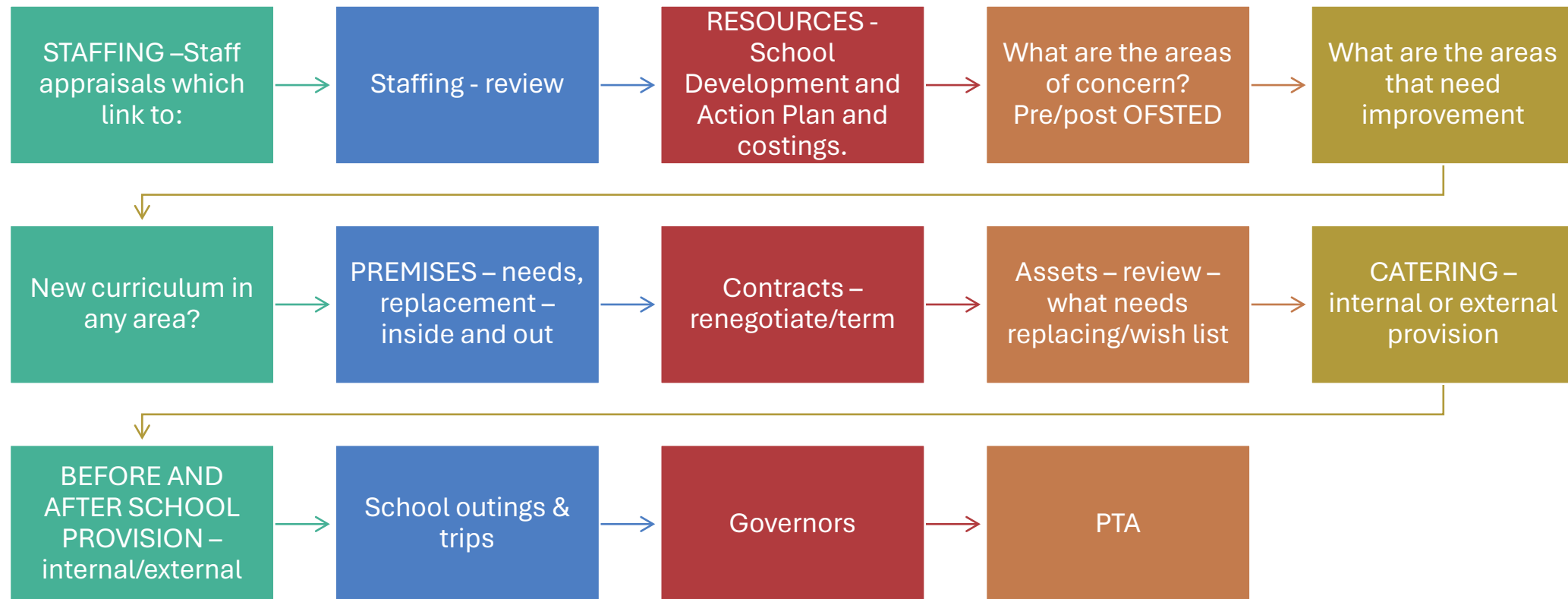
Catering  
What provision do you  
need/affordability  
FSM

Before and After School  
Provision  
What is needed versus  
affordability

Premises  
Utilities  
Costs involved  
Outdoor areas

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# IT IS PUTTING ALL THE PIECES TOGETHER AND HOW THEY LINK:



# SCHOOL DEVELOPMENT PLAN

The School Improvement Plan or School Development Plan (SDP) is the central document in which School Leaders map out their strategic plans for the development of their school. Based around the school's established values, it sets out the actions and resources needed to achieve priority objectives.

Effective School Development Plans include:

School Vision

Quality of Education

Behaviour & Attitude

Personal Development

Leadership & Management

In Jewish schools incorporate Jewish vision

## Leading Edge Development Plan 2007-2010 Building Learning Power: Assessment for Learning and Student Voice Strand 2

Leader: Kelly Maywood

SEF Ref	Target with outcomes Outcomes can be expressed in terms of knowledge, skills and/or understanding learners will gain	Actions Implementation strategies mostly in terms of Teaching & Learning, training and resources	Time frame 1–3 years		Finance (in £)	Monitoring and Evaluation	
			Start	Finish		Method/data used	Further Developments
5e	To ensure that learning styles data is available in an accessible format in Sims to promote greater differentiation in lesson planning and personalising of learning activities.	Years 7,8,9 do paper exercise, Years 10,11 do junior exercise LSA online Year 12 do senior exercise LSA online Guidance to all staff on using LSA data for differentiation	Sept 07	ongoing	£1200	Student questionnaires and use of student voice. Lesson observations MER/SEF evidence	Look at the analysis of exam results using LS data Measure impact on attainment
4g	Increase the use of Student Voice to develop teaching and learning and in 'Building Learning Power' action research. Three focuses looking at 1. lesson observation for G and T, BLP, VAK 2. school organisation 3. school strategic	New SV group members recruited. Establish protocols for students doing lesson observations. Science and 1 other subject department to use SV in SEF evaluation – as pilot. SV in groups for action research with teachers SV attending meetings/recruit new staff Collaboration with Hillview – lead school Research and Development Hub	Sept 07	June 08	Photocopying SV observation forms £50	SV feedback forms Lesson observations evidence BLP and response to students views. TGS students present at regional Student Voice Conference.	Widening the use of SV in all subject evaluations More links with SV, A4L and L2L Use staff feedback to develop the programme SV training programme model shared with partner schools
	Co-lead the Teaching and Learning Group: Deliver core inset on the teenage Brain. Increase knowledge and understanding of Claxton's research on Building Learning Power through discussion at TLG.	Liaise with JCH on planning inset Arrange guest speaker for INSET. Encourage more partner schools to attend. Action research using own teaching groups paired with others – disseminate info and share practice through TLG meetings. Keep up to date Claxton's research Attend INSET Deep Learning and support and cascade Contribute to 6 TLG meetings over year. Newsletter with LTY.JJV Leading Friday TLG meetings	Sept 07	June 08		Evaluation forms workshop members. Increased awareness of BLP shared through TLG newsletter. Deep learning and support INSET info disseminated through TLG/staff meetings/mini school team meetings	Take comments from inset and SV feedback to review next steps.



# SCHOOL ACTION PLAN

## Primary Physical Education and Sport Funding Action Plan Example

Amount of Grant Received – Year 2018-2019: £16,000 + £10 per pupil.

Key Indicator 1: the engagement of all pupils in regular physical activity - the Chief Medical Officer guidelines recommend that all children and young people aged 5 to 18 engage in at least 60 minutes of physical activity a day, of which 30 minutes should be in school

Key Indicator 2: the profile of PE and sport is raised across the school as a tool for whole-school improvement

Key Indicator 3: increased confidence, knowledge and skills of all staff in teaching PE and sport

Key Indicator 4: broader experience of a range of sports and activities offered to all pupils

Key Indicator 5: increased participation in competitive sport

The School Action Plan sets out how the school will address issues within the school either following inspection / review or should be in place pre OFSTED.

School action plans that actually work include:

- Careful evaluation
- Getting everyone involved
- Identifying the best people to help
- Using it as a concise and effective management tool that guides the school in bringing about improvements, a timetable and a check list.
- Costed / time specific / clear desired outcomes

Intention		Implementation				Impact
Area of Focus	Evidence of need (Why we are doing it)	Action Plan	Who	Time Scale	Funding Breakdown	Success Criteria/Impact and Evidence record
<b>PE Curriculum</b>  Increase staff confidence and ability to lead PE and improve knowledge and understanding as per identified needs on audit.  Raise the profile of PE across the school.  Judge effectiveness and impact of sports funding spend and	Staff feedback from questionnaires  Learning walks  Conversations with Staff.  Pupil voice	Staff questionnaire sent out to determine any CPD needs they may have.  PE CPD needs planned into the calendar for the year based on staff feedback and any monitoring activities conducted; – Level 5 qualification in PE specialism – 27 <sup>th</sup> June, 13 <sup>th</sup> Sept, 7 <sup>th</sup> Nov & 10 <sup>th</sup> Jan. – Early years physical development course – 31 <sup>st</sup> January 2019 – Improving health and well-being – 18 <sup>th</sup> October 2018. – Improving and measuring pupils fitness programme – 25 <sup>th</sup> Sept 2018 & 24 <sup>th</sup> Jan 2019. – Improving school swimming – 4 <sup>th</sup> October 2018. – Outdoor and adventurous activities course (local?) – Gymnastics course (Local?) – PE Network meetings – 19 <sup>th</sup> Sept 2018.	LP   LP  LC   LP	Summer 18  4 days   Through Year	£900 – Level 5 qualification  £600 contribution to networks, conference and courses in moorlands.  £1800 for 10 dates teacher release costs to attend	As a result of the staff professional development and monitoring taking place there has been an increase in pupils knowledge of skills and understanding within PE. Pupils attainment has risen from 70% meeting age related expectations in PE from to 90% with 35% of children exceeding expectations. Pupils have reported increased enjoyment and engagement in PE lessons and through the celebration of sport and activities their confidence, self-esteem and belief has visibly improved.  <b>Evidence:</b> Lesson observations, planning documents, Learning walks, <b>Sustainability:</b> Changes made to the PE curriculum and lessons will continue to be

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# SOURCES OF INCOME

- Delegated funding – dedicated schools grants, usually has no strings attached
- Devolved funding – comes with conditions on how the money can be spend eg. you must be able to demonstrate how pupil premium is benefitting students.
- Capital funding – can only be used to improve a long-term asset eg. upgrading school building or on school IT.
- Revenue funding – should be used within a year on salaries, running costs, curriculum resources.
- School Condition Allocation/Condition Improvement Fund – this is an annual bidding round for eligible\* VA schools to apply for capital funding. The priority for the fund is to address significant condition need, keeping the buildings safe and in good working order. This includes funding projects to address health and safety issues, building compliance and poor building condition. Previously LCVAP funding.
- SEN Funding
- Voluntary Contributions
- PTA
- Fundraising initiatives
- Lettings

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# FOR INFORMATION

- In total, average per-pupil funding in schools for 2024 is £3,739 (crude terms  $\text{£3,739} \times 360 \text{ pupils} = \text{£1,346,040} / 196 \text{ days} = \text{£6,866} \text{ per day to run the whole operation or } \text{£19} \text{ per child per day}$ )
- PE/Sports Premium – every school receives
- The running costs of voluntary aided schools, like those of other state-maintained schools, are fully paid by central government via the local authority. They differ from other maintained schools in that only 90% of their capital costs are met by the state, with the school's foundation contributing the remaining 10%.
- Pupil Premium - deprivation pupil premium (the element linked to FSM eligibility) was worth £1,455 at primary level, and £1,035 at secondary level based on a combination of factors i.e. postcode. Jewish schools unlikely to receive this.



# EXAMPLE OF SCHOOL BUDGET LOOKS LIKE

Income	18/19 Outturn	Current Budget	Actual to date	Forecast Outturn	Variance
11 GAG Income	856789	915,948.00	476,167.00	920,995.00	(5,047.00)
13 LA SEN Funding	0	0.00	0.00	0.00	0.00
15 Pupil Premium	1430	2,400.00	660.00	2,400.00	0.00
17 Other Grants & Payments Rec'd		40,000.00	19,460.00	40,000.00	0.00
18 Other Facilities & Services	18361	0.00	10,627.00	1,281.00	(1,281.00)
19 Catering Income		0.00	10,852.00	2,827.00	(2,827.00)
3 Donations & Voluntary Contributions	21853	174,000.00	3,567.00	174,000.00	0.00
101 Capital Income	175440	0.00	19,574.00		0.00
<b>Total Income</b>	<b>£1,073,873.00</b>	<b>£1,132,348.00</b>	<b>£540,907.00</b>	<b>£1,141,503.00</b>	<b>-£9,155.00</b>

## Additional Comments

Expenditure		Current Budget	Actual to date	Forecast Outturn	Variance
21 Teaching Staff	503448	673,017.00	315,388.00	678,064.00	(5,047.00)
23 Education Support Staff	113897	128,599.00	81,235.00	128,599.00	0.00
24 Premises Staff	0		0.00	0.00	0.00
25 Administrative Staff	33724	39,000.00	19,471.00	39,000.00	0.00
27 Other Staff	0	0.00	0.00	0.00	0.00
28 Other Staff Costs	1381	6,667.00	940.00	6,667.00	0.00
29 Training	730	8,000.00	2,184.00	8,000.00	0.00
12 Repairs and Maintenance	10343	26,667.00	4,001.00	26,667.00	0.00
13 Grounds Maintenance	5000	1,500.00	0.00	1,500.00	0.00
14 Cleaning & Caretaking	22124	30,000.00	1,653.00	30,000.00	0.00
15 Water & Sewerage	4000	5,333.00	0.00	5,333.00	0.00
16 Energy Costs	31283	36,000.00	2,196.00	36,000.00	0.00
17 Rates	0	5,000.00	0.00	5,000.00	0.00
18 Other Premises Costs	2666	10,000.00	105.00	10,000.00	0.00
19 Learning Resources (IN)	40000	53,333.00	41,879.00	53,333.00	0.00
20 ICT Learning Resources	22225	3,000.00	196.00	3,000.00	0.00
21 Examination Fees	0	0.00	0.00	0.00	0.00
22 Administration Costs	3426	26,667.00	5,708.00	26,667.00	0.00
23 Other Insurance Premiums	3600	4,500.00	2,160.00	4,500.00	0.00
24 Other Facilities Expenditure	0	0.00			0.00
25 Catering	53775	5,333.00	38,909.00	5,333.00	0.00
26 Agency Supply Staff	15681	24,000.00	2,159.00	24,000.00	0.00
27 Professional Services - C	100	20,000.00	138.00	20,000.00	0.00
28 Professional Services - I	217	6,667.00	999.00	6,667.00	0.00
Contingency	0	0.00	0.00		0.00
E02 Capital Expenditure	177800	0.00	23,355.00		0.00
<b>Total Expenditure</b>	<b>£1,045,420.00</b>	<b>£1,113,283.00</b>	<b>£542,676.00</b>	<b>£1,118,330.00</b>	<b>-£5,047.00</b>

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# FURTHER INFORMATION:

- SFVS – School Financial Standards to be completed to ensure all documentation up to date and fit for purpose such as – worth reading
- Financial policies and procedures – worth reading
- Attend Governor Meeting especially budget setting.
- Be aware of the level of voluntary contributions raised.
- [School finance | GovernorHub Knowledge \(thekeysupport.com\)](https://thekeysupport.com/school-finance)
- [DfE's benchmarking tools for schools improve financial management - Case study - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/case-studies/dfe-benchmarking-tools-for-schools-improve-financial-management)

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# WHAT QUESTIONS WOULD YOU ASK AT A GOVERNORS MEETING

- Intent
- How
- Impact

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# WHAT SHOULD I BE LOOKING FOR WHEN I RECEIVE FINANCE INFORMATION FROM MY SCHOOL?

- Projected pupil numbers and Free School Meal numbers (if any).
- What do the headline figures look like – overview of monies received and spent at the time of the report.
- Are there significant differences in the Finance Report since the last one and why?
- Where the changes foreseeable?
- What are the consequences of the changes?
- Overview of the expenditure to date and how much has the school left to spend for the remainder of the year?
- What is the predicted year end figure?
- Compare the 3 to 5 year financial projections and the assumptions made to cost them to see if in line.
- Level of Voluntary Contributions raised.

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# WHAT QUESTIONS SHOULD I BE ASKING? (EXAMPLES)

- What is the budget process – is it the same every year?
- What are the staff paid as a percentage of total expenditure?
- What are the pupil to teacher ratio (PTR)? How big are the classes – Governors can decide to go over standard numbers – impact?
- Class sizes – if not full, why?
- What proportion of the budget is spent on the leadership team?
- Does the spend per pupil compare to similar schools?
- Are the relative costs of the School Development Plan prioritised?
- What impact is expenditure having?
- SEN requirements being met?