

Pupil Movement Policy Review

Document for consultation

(Dates 22nd November to 13th December 2022)

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1. Background

- 1.1. It was agreed in December 2019 to introduce a policy for the financial year 2021-22 onwards where funding would transfer between schools in recognition of in-year pupil movements between Powys schools. The table below sets out the amounts that were agreed to be transferred between schools in each of the financial years that the pupil movement takes place. If a pupil was to move between Powys schools after the November count date for pupil numbers used to determine schools' budget shares for the following financial year, then a transfer of £3,000 would take place for the new financial year as well.

Timing of Pupil transfer:	Funding to transfer in current financial year	Funding to transfer in following financial year
From 1 April but before 1 May	£3,000	
On or between 1 May and 30 September	£1,750	
On or between 1 October to 31 March	£750	
After November count date to 31st March		£3,000

NB this does not include pupil movement as a result of the usual transition process.

- 1.2. The funding transfers have been taking place at three points during the year:

Timing of Adjustment	Period adjusted for	Notes
October	6 months from 1 April to 30 September	<i>allows schools' budgets to be adjusted for the "peak" pupil movement period in September as early as is practicable</i>
February	4 months from 1 October to 31 January	<i>Allows the funding figures for the new financial year to be as up to date as possible when circulated to schools in February</i>
April	2 months from 1 February to 31 March	<i>Allows a final adjustment to ensure correct funding levels at year end for the financial year that is closing and up-to-date funding levels for the new financial year prior to budget submission on 1 May</i>

- 1.3. This policy was to be reviewed in line with the roll out of the new Primary formula agreed in December 2021 as it was seen as a temporary measure until the pupil led formulae were in place.

2. Review of the policy

2.1. The policy has been in place since the 2020-21 financial year and upon review the following issues have been identified

- The policy does not reflect pupil movement from / to out of county schools
- Fluctuations in delegated funding, particularly for schools in areas of a more transient population.
- The policy does not cover significant increases in pupil numbers in the September admissions round
- The policy relies on multiple manual data entries rather than being automated and downloaded from a system.

3. Impact of issues

3.1. The table below identifies the impact the issues identified upon review have.

Issue	Impact on Schools
The policy does not reflect pupil movement from / to out of county schools	Schools that have a high volume of inter-county pupil movement are still faced with no resolution to the financial strains this causes on the delegated budget.
Fluctuations in delegated funding, particularly for schools in areas of a more transient population.	The adjustments made for the policy to the delegated funding can increase or decrease the funding throughout the year. In some cases, there are considerable increases/decreases during the year that net out by year end. This causes issues with financial management and schools cannot react in a timely manner due to management of change processes to effectively deal with the budget pressures the policy is imposing on them.
The policy does not cover significant increases in pupil numbers in the September admissions round	September admission round changes in pupil numbers for Reception intake versus Year 6 leavers or Year 7 intake versus Year 11 leavers are not considered within this policy. Schools that have a larger intake than leavers which is large enough to need to amend class structures are not helped by this policy.
The policy relies on multiple manual data entries rather than being automated and downloaded from a system.	Multiple manual data entries are required, each carrying a high risk of data entry errors. Detailed information may be missing or incorrect, dates may be incorrect, which then impacts on the robustness of the data upon which financial adjustments are made between schools. This in turn causes capacity issues within the school service, finance and in schools themselves checking the data or dealing with corrections and queries regarding this.

4. What do other Welsh authorities do?

- 4.1. Officers gathered information from other Welsh authorities on how they reflect pupil number changes within the financial year for discussion at the Formula Review Group. Of the 11 responses received, 7 considered each situation on a case-by-case basis while the other 4 each had unique methodologies.

5. Proposal for consultation

- 5.1. It is proposed that the current policy is ceased from the 31st March 2023.
- 5.2. In replacement of the current policy it is proposed that issues as a result of pupil movement are looked at on a case by case basis.
- 5.3. Schools that identify structural changes or financial pressure that the school cannot manage within existing funds for the types of pupil movement laid out below, will need to complete a template provided by the Authority to request additional financial support. The template will gather the required evidence from the school for the finance team to cost options which can be reviewed by relevant officers within schools service and a decision made on whether additional funding should be awarded.

Types of pupil movement to be covered by this policy
Transfers into schools from other Powys schools
Transfers into Powys schools from out of county schools or from elective home education (EHE)
Increases in overall pupil numbers during the September admissions round that were not anticipated.

NB no reductions in delegated funding will be applied for pupil transferring out of schools.

- 5.4. The template is proposed to be simple and easy to complete using information the school has available.

Question A1: Do you agree that the current pupil movement policy is no longer used to adjust delegated funds in year for pupil transferring between Powys schools?

Question A2: What other comments would you like to make in relation to the current pupil movement policy no longer being used to adjust delegated funds in year for pupil transferring between Powys schools?

Question A3: Do you agree that pupil movement should be considered on a case-by-case basis should it cause financial pressures that a school cannot manage within existing funds?

Question A4: Do you agree that a simple template should be developed for schools to use to apply for additional financial support in relation to pupil movement?

Question A5: Please make any other comments would you like to in relation to the pupil movement policy.