

SCHEDULE 3

Regulation 27

MINIMUM FUNDING GUARANTEE

- 1.—(1) In this Schedule—
- (a) references to the number of pupils—
 - (i) for the purposes of the previous funding period, exclude those funded by a sixth form grant; and
 - (ii) for the purposes of the funding period, exclude those funded by a sixth form grant;
 - (b) the “relevant number” of pupils for the previous funding period is the number of pupils at the school on 6th October 2022;
 - (c) the “relevant number” of pupils for the funding period is the number of pupils at the school on 5th October 2023;
 - (d) the “minimum funding number” means a number determined by the authority, between and including 1.000 and 1.005;
 - (e) the redetermined adjusted budget share for the previous funding period means a number calculated by the authority, which must—
 - (i) exclude—
 - (aa) any amount allocated under regulation 14(2) (places reserved for children with special educational needs) of the 2023 Regulations;
 - (bb) any amount included under regulation 34 (sixth form funding) of the 2023 Regulations;
 - (cc) any amount included under regulation 38 (correction of errors and changes in non-domestic rates) of the 2023 Regulations;
 - (dd) the difference between (a) any amount allocated to the school under regulation 35(4) or (8) (new schools, merged schools and closing schools) of the 2023 Regulations, and (b) the single sum which the school would have received under regulation 17 (lump sums for primary and secondary schools) of the 2023 Regulations, had regulation 35(4) or (8) of the 2023 Regulations not applied;
 - (ee) any amount allocated to the school under Schedule 3 (additional requirements etc which may be taken into account) to the 2023 Regulations where such amount has been deducted from the schools budget under Part 5 (children and young people with high needs) of Schedule 2;
 - (ff) any amount allocated to the school under regulation 10(3) (early years single funding formula) of the 2023 Regulations;
 - (gg) any amount included in respect of paragraph 2 (rates) of Schedule 3 to the 2023 Regulations;
 - (hh) any amount allocated to the school under regulation 16(2) (primary lump sum) or, where regulation 29(4) or (8) applies, the amount allocated to the school under that regulation);
 - (ii) any amount allocated to the school under regulation 16(3) (secondary lump sum) or, where regulation 29(4) or (8) applies, the amount allocated to the school under that regulation;
 - (jj) any amount allocated to the school under regulation 21(2) (primary population sparsity);

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- (kk) any amount allocated to the school under regulation 21(7) (secondary population sparsity);
 - (ll) any amount added to the school's budget share under regulation 37 (pupils permanently excluded from, or leaving, maintained schools) of the 2023 Regulations; and
- (ii) include—
- (aa) any amount deducted from the school's budget share under regulation 11(5) or (6) (determination of allocation of budget shares etc. for the funding period), 26(2) (risk protection arrangement) or 37 (pupils permanently excluded from, or leaving, maintained schools) of the 2023 Regulations; and
 - (bb) any amount representing the allocation to the school in the previous funding period in respect of the mainstream schools additional grant⁽¹⁾, as shown on the authority proforma tool⁽²⁾ for 2024–25 sent to the authority by the Department for Education in December 2023;
- (f) references to a redetermined adjusted budget share for the funding period include the effect of any alternative arrangements approved by the Secretary of State under regulation 41, but the authority must—
- (i) exclude—
- (aa) any amount allocated under regulation 14(2) (places);
 - (bb) any amount included under regulation 28 (sixth form funding);
 - (cc) any amount included under regulation 40 (correction of errors and changes in non-domestic rates);
 - (dd) any amounts allocated under regulation 10(1) (formula for determining budget shares) which would have been within a class or description of the expenditure listed in Schedule 2 to the 2023 Regulations that the authority deducted in the previous funding period;
 - (ee) any amount allocated to the school under regulation 10(3) (early years single funding formula);
 - (ff) any amount included in respect of regulation 24(3)(a) (non-domestic rates);
 - (gg) any amount allocated to the school under regulation 16(2) (primary lump sum) (or, where regulation 29(4) or (8) applies, the amount allocated to the school under that regulation);
 - (hh) any amount allocated to the school under regulation 16(3) (secondary lump sum) (or, where regulation 29(4) or (8) applies, the amount allocated to the school under that regulation);
 - (ii) any amount allocated to the school under regulation 21(2);
 - (jj) any amount allocated to the school under regulation 21(7);
 - (kk) any amount added to the school's budget share under regulation 39 (pupils permanently excluded from, or leaving, maintained schools); and

(1) "The mainstream schools additional grant" means a grant of that name paid to a local authority by the Secretary of State under section 14 of the 2002 Act.

(2) The authority proforma tool is provided to local authorities to enable them to detail their schools' block funding formulae. The 2024 – 2025 authority proforma tool can be found in a document entitled "Authority Proforma Tool (APT): purpose and process – instructions for local authorities for 2024 to 2025" published in December 2023 at . A printed copy may also be inspected at the Department for Education, Sanctuary Buildings, Great Smith Street, London SW1P 3BT, upon request.

(ii) include any amount that is deducted from a school's budget share under regulation 11(5) or (6) (applications to a schools forum or to the Secretary of State for authorisation to redetermine budgets), 22(2) (risk protection arrangement), 39 or 40.

(2) For the purposes of this Schedule—

- (a) where a school opened during the previous funding period, its redetermined adjusted budget share for the previous funding period is the amount it would have been if the school had opened on 1st April 2023; and
- (b) where a school opens during the funding period, its redetermined adjusted budget share for the funding period is the amount it would have been if the school had opened on 1st April 2024,

in both cases adjusted in accordance with paragraph 1(e) or (f), whichever is applicable.

2. Where (A/B) is less than (C/D) then the guaranteed funding level is $(C/D) \times B$ where—

A is the redetermined adjusted budget share, calculated by the authority, for the funding period;

B is the relevant number of pupils in the funding period;

C is the redetermined adjusted budget share for the previous funding period multiplied by the minimum funding number; and

D is the relevant number of pupils in the previous funding period.

3. Where a new school opens during the funding period and is a replacement for two or more schools being discontinued during the funding period, its guaranteed funding level must be calculated in accordance with paragraph 2, subject to paragraph 4.

4. In calculating the guaranteed level of funding under paragraph 3 the relevant number of pupils in the previous funding period under paragraph 1(1)(b) is the sum of the relevant number of pupils in the discontinued schools on 6th October 2022.

5. In calculating the redetermined adjusted budget share for the previous funding period, the authority may exclude any amounts allocated under the premises factor allocation to the school if it also excludes the amount from the redetermined adjusted budget share calculated for the funding period.