

Reference Number: FOI-101004727970

Response provided under: Freedom of Information Act 2000

Request and response:

Local authorities are able to claw back money from schools posting excess surplus balances (see 6.2: <https://www.gov.uk/government/publications/schemes-for-financing-schools/schemes-for-financing-local-authority-maintained-schools>)

Please could you provide the following information:

- 1. Does your local authority have a policy to claw back money from schools with excess surpluses?**

The Policy was withdrawn during the 2016/2017 financial year just prior to starting to transition toward the National Funding Formula.

- 2. If so, what is that policy? E.g., does it apply to schools with a surplus worth x% of their income, or with a value exceeding a certain £?**

N/A

- 3. How many schools had money clawed back from their surplus in each of the following years: 2018-19, 2017-18, 2016-17?**

Whilst a number of schools had their reserves capped, all capped funds were returned during the 2017/2018 financial year or prior to conversion to academy status. No school had funds clawed back that were not reinstated at a later date.

- 4. How many schools appealed the clawback in each of those three years?**

N/A

- 5. How many of the appeals were accepted, in each of those years?**

N/A

6. What was the total amount of money from schools' excess surpluses that was clawed back in each of those years?

N/A

Information provided by: Together for Families

Date of response: 27th January 2020