

Oxfordshire County Council
Schools Forum – 7 February 2018
Schools Funding Formula 2018-19 - Authority Proforma Tool (APT)

| Settings | | Sector | |
|--------------------|---|------------------|---|
| Academies | ✓ | Foundation Stage | |
| Maintained Schools | ✓ | Primary | ✓ |
| PVI Nurseries | | Secondary | ✓ |
| Special Schools | | Special | |
| Local Authority | ✓ | 16+ | |
| Schools Forum | ✓ | High Needs | |

1. Item for Information

2. Purpose of Report

- 2.1 The purpose of this report is to update Schools Forum on the schools funding formula model for 2018-19. Following agreement of the approach at the Schools Forum meeting on 9 January 2018, and further work on the model, the template (Authority Proforma Tool - APT) was submitted to the Department for Education (DfE) by the deadline of 19 January 2018.
- 2.2 This report updates Schools Forum on the submitted APT and the latest feedback from the Education and Skills Funding Agency (ESFA). A verbal update will be provided at the meeting on any further information received from the ESFA. Should confirmation of the APT be received from the DfE in the interim, the agreed budget summary proforma will be circulated as Annex 1 to this report.

3. Information for Schools Forum

- 3.1 At the Schools Forum meeting on 9 January 2018, Schools Forum was presented with the proposed unit rates for the formula. The agreed principle was to implement the transitional National Funding Formula (NFF) for 2018-19 as closely as possible within the constraints of overall funding. Annex 2 shows the NFF unit rates before and after the application of the Area Cost Adjustment (ACA) for Oxfordshire. These unit rates, including the ACA, were endorsed in principle for the formula.
- 3.2 Schools Forum was informed that further checks were being undertaken at individual school level and that a response to an enquiry to the ESFA regarding Rates figures was expected. In this context, Schools Forum endorsed the proposal to adjust the ACA by percentage points, if required, to move the formula factors to an affordable level where adjustments were identified.

- 3.3 Further to the Schools Forum meeting on the 9 January 2018, the ESFA confirmed in writing that the Rates figures for some academies which they provided by email were to be included in the APT. A verification exercise was also undertaken directly by the Finance Team and a sample of responses were reviewed. The rates figures received from the ESFA were included in the submitted APT.
- 3.4 Further to the last report to Schools Forum, the ESFA contacted Local Authorities on 12 January 2018 with revised base data for the APT. Due to a census processing error at the DfE, the Free School Meals (FSM) data was incorrect. This made significant differences to the APT base data and recalculations were required and additional checking at individual school level.
- 3.5 Schools Forum is asked to note that all Disapplication requests agreed by Schools Forum and sent to the DfE were approved, with final confirmation for one of the requests being received on 18 January 2018.
- 3.6 Schools Forum is asked to note that the Government laid the necessary legislation to formalise the rules and principles contained within the APT operational guidance before Parliament in January 2018. The School and Early Years Finance Regulations 2018 come into force on 5 February 2018. No changes are required to the APT in relation to this.
- 3.7 Schools Forum is asked to note that formal approval of the APT by the ESFA is awaited. Some initial requests for additional information from the ESFA have been provided via resubmission of the APT, in the normal way. (These made no difference to the financial values in the originally submitted summary). Any further updates will be provided at the Schools Forum meeting on 7 February 2018.
- 3.8 Schools Forum is asked to note that school budget shares will be published on the intranet as soon as possible, following approval of the APT by the DfE. The official deadline for publication is 28 February 2018, but schools' budgets have been released considerably earlier than this in Oxfordshire. An accompanying letter will also be sent to schools.

4. Implementation of the National Funding Formula

Schools Forum is asked to note that the APT submitted to the ESFA included the full values of the National Funding Formula, including the ACA for Oxfordshire, as outlined at Annex 2. This included the NFF approach of using the full rate of £3,500 and £4,800 where this applies. The ESFA are undertaking checks and should any issues be identified by the ESFA that change any allocations this will be reported at the meeting on 7 February. If there are no further changes, Oxfordshire will have implemented the transitional national funding formula factors in full within the APT.

5. Financial and Staff Implications - centrally and for schools

This paper already deals with the financial implications of the funding formula for 2018-19, so no further comment is made.

6. Equal Opportunities Implications and Impact on Equality Groups

Following consultation, the funding formula follows the National Funding Formula, reflecting nationally identified priorities, including the needs of vulnerable pupils. Where the LA continues to have discretion in the funding decisions made, it will continue to give priority to the needs of vulnerable pupils and the Council's aims of raising attainment, narrowing the attainment gap and safeguarding children.

7. Conclusions

This paper updates Schools Forum regarding the 2018-19 funding model (APT) submitted to the DfE.

8. Contact Details of Lead Officer/Author

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National Funding Formula (NFF) rates and NFF rates plus Area Cost Adjustment (ACA) for Oxfordshire

NFF FACTOR RATES (WITHOUT ACA)

WITH OXFORDSHIRE ACA

ACA = 1.02176

Pupil Led Factors

As applied to APT

| | | | |
|---|---|---|--|
| 1) Basic Entitlement Age Weighted Pupil Unit (AWPU) | Primary (Years R-6) | £2,746.99 | |
| | Key Stage 3 (Years 7-9) | £3,862.65 | |
| | Key Stage 4 (Years 10-11) | £4,385.81 | |
| | Description | Primary amount per pupil | Secondary amount per pupil |
| 2) Deprivation | FSM | £440.00 | £440.00 |
| | FSM6 | £540.00 | £785.00 |
| | IDACI Band F | £200.00 | £290.00 |
| | IDACI Band E | £240.00 | £390.00 |
| | IDACI Band D | £360.00 | £515.00 |
| | IDACI Band C | £390.00 | £560.00 |
| | IDACI Band B | £420.00 | £600.00 |
| | IDACI Band A | £575.00 | £810.00 |
| | Description | Primary amount per pupil | Secondary amount per pupil |
| 3) Looked After Children (LAC) | LAC - Not Applicable | | |
| 4) English as an Additional Language | EAL 3 Primary | £515.00 | |
| | EAL 3 Secondary | | £1,385.00 |
| 5) Mobility | Pupils starting school outside of normal entry dates | £639.65 | |
| | Description | Weighting | Amount per pupil |
| 6) Prior attainment | Low Attainment % new EFSP | 100.00% | £1,050.00 |
| | Low Attainment % old FSP 78 | | |
| | Secondary low attainment (year 7) | 58.05% | £1,550.00 |
| | Secondary low attainment (year 8) | 48.02% | |
| Secondary low attainment (years 9 to 11) | | | |
| Other Factors | | | Lump Sum per Primary School (£) |
| 7) Lump Sum | | | £110,000.00 |
| 8) Sparsity factor | | | £25,000.00 |
| Split sites | £30,000 per applicable site | | |
| Rates | As actual rates | | |
| Exceptional rents | Exceptional actual rents relating to 6 qualifying schools | | |

| | |
|--|--|
| £2,806.76 | |
| £3,946.70 | |
| £4,481.25 | |
| Primary amount per pupil | Secondary amount per pupil |
| £449.57 | £449.57 |
| £551.75 | £802.08 |
| £204.35 | £296.31 |
| £245.22 | £398.49 |
| £367.83 | £526.21 |
| £398.49 | £572.19 |
| £429.14 | £613.06 |
| £587.51 | £827.63 |
| Primary amount per pupil | Secondary amount per pupil |
| £526.21 | |
| | £1,415.14 |
| £639.65 | |
| Weighting | Amount per pupil |
| 100.00% | £1,072.85 |
| 58.05% | |
| 48.02% | £1,583.73 |
| | |
| Lump Sum per Primary School (£) | Lump Sum per Secondary School (£) |
| £112,393.60 | £112,393.60 |
| £25,544.00 | £66,414.40 |

ACA not applicable

Pre-populated %
changed by ESFA in
Dec APT (was 48.02%)

ACA not applicable
ACA not applicable
ACA not applicable

MFG = 0.5% (positive)

Capping - Effect of capping 3% - made up of 2.5% direct capping plus 0.5% positive MFG = equiv of 3% capping

Primary minimum per pupil funding level = £3,300

Secondary minimum per pupil funding level = £4,600