### ROYAL BOROUGH OF WINDSOR & MAIDENHEAD SCHOOLS FORUM

Date: 2<sup>nd</sup> November 2017 AGENDA ITEM: 07

Title: School Funding 2018/19 and Consultation

Responsible

officer:

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### 1 PURPOSE AND SUMMARY

- 1.1 The purpose of this report is to provide the Schools Forum with:
  - the options for the soft formula years 2018/19 and 2019/20 and to seek Schools Forum views on the transitional arrangements
  - the details to support the Growth Fund allocations; shown in appendix A
  - the details to enable an informed discussion in respect of a budget movement from the Schools Block to the High Needs Block
  - the details to allow the Local Authority to consult schools on the movement towards the National Funding Formula (NFF) model

#### 2 RECOMMENDATIONS

### 2.1 That the Forum:

- note and comment on the contents of this report
- discuss the budget movement from Schools Block to the High Needs Block
- discuss the consultation options contained within this report

## 3 BACKGROUND

- 3.1 The Secretary of State has made several announcements on the National Funding Formula, with the latest statement made to Parliament on the 14th September 2017. This statement was accompanied by a release of illustrative funding figures for each school by the DfE.
- The full implementation of the NFF will not occur until 2020/21. The preceding two years (2018/19 and 2019/20) are referred to as "soft" years where the authority will receive its Schools Block funding based on an NFF calculation at a national level but the money will be distributed to schools based on a local formula that is similar to the current system.
- 3.3 Further details and supporting documentation is included within the Schools Budget Funding Arrangements 2018/19 and beyond report.

### 4 FINANCIAL SUMMARY

4.1 The indicative DSG allocation for 2018/19 is £103,042,001. This is the total funding available to the Royal Borough to fund the schools Formula, High Needs and Central Schools Services Budgets for 2018/19. The provisional block funding will be updated in

December to reflect the latest Census information. Table 1 sets out the indicative NFF funding in 2018/19 excluding Early Years which will be provided following the January census.

## Table 1 Indicative NFF funding 2018/19

Block	Indicative NFF funding in 2018/19 £000
Schools	83,184
High Needs	18,725
Central School Services	1,133
TOTAL Provisional Funding 2018/19	103,042

#### 5 FUNDING FORMULA COMPARISONS

- 5.1 For comparison purposes the following has been provided in appendix B.
  - current 2017/18 funding formula allocations
  - indicative NFF model allocations; reflecting the full impact of implanting the model
  - indicative formula modelling
- 5.2 In addition appendix C sets out the impact of proposed models on a school by school basis demonstrating gainers and losers of each model.
- 5.3 During the "soft" years the local authority will receive funding via a per pupil rate for primary and secondary pupils. The rates will be derived by calculating the funding each local authority school would receive using an NFF calculation. Authorities will receive schools block allocations based on a derived primary pupil rate and derived secondary pupil rate.
- 5.4 The DfE have set a minimum value of £4,800 for secondary pupils and £3,500 for primary schools for 2019/20 with interim rates of £4,600 and £3,300 for 2018/19. The DfE have also said that the per pupil rates will include a 0.5% increase per pupil per school on the preceding years per pupil funding.
- 5.5 Forum are asked to note that funding has been transferred from the High Needs block to the schools block to offset the change to the funding source of "Element 1" within Place Plus for a provision. The Schools Formula shares from 2018/19 will include the funding for Resource unit pupils. The funding rates will also include the historic funding of growth and premises
- 5.6 Included within the models are the following assumptions:
  - models are based on the 2017/18 data
  - Schools Block continued funding for the growth fund; estimated as £402,076 2018/19 (see appendix A)
  - propose a transfer of 0.5% (estimated at £416,000) from the Schools Block to the High Needs block to support the implementation of the SEND strategy implementation action plan being led by a working group of headteachers, SENCOs and practitioners from a range of services. This is allowed in the operational guide. This proposal is reflected in models 1 & 2.

5.7 A summary of the proposed formula changes is set out in table 2. Appendix D to F demonstrate the impact of the models on individual schools.

**Table 2 Proposed migration from Local Formula to National Formula** 

Factors	Model 1 (Appendix D)	Model 2 (Appendix E)	Model 3 (Appendix F)	
	%	%	%	
AWPU	60.0	60.0	65.0	
Pupil Led Factors	75.0	65.0	100.0	
LAC	50.0	50.0	50.0	
MFG	(1.5)	(1.5)	(1.5)	
Block Transfer	0.5	0.5	0.0	

5.8 The Schools Block Funding 2018/19 and total to be distributed via the formula is set out in table 3.

**Table 3 Schools Block Funding 2018/19** 

Schools Block Funding	£'000s		
Provisional Schools Block Allocation	83,184		
Less: Schools Growth Fund	(402)		
Less: High Needs Block Transfer @ 0.5%	(416)		
Total to be distributed via Formula	82,366		

5.9 In the provisional Schools Block allocations to each local authority the funding for the schools block includes the Area Cost Adjustment (ACA) to reflect differences in cost between different parts of the country. For RBWM the ACA is 1.05613.

## **6 CONSULTATION**

- 6.1 The Royal Borough have considered a number of options to migrate from the current local formula towards the NFF rates over the two 'soft' formula years, whilst still making available funding to cover the cost of growth fund commitments with RBWM schools and the ongoing pressures in the High Needs funded budgets.
- 6.2 Consultation will be undertaken during the period 8th November to 22nd November 2017. Only one submission will be accepted per school, responses will be collated and anonymised before being published at the January 2018 Schools Forum. Consultation will focus on the following areas with specific questions as proposed below:
  - the level of migration to the NFF methodology
  - support for growth fund allocations
  - transfer of block funding
- 6.3 In advance of the consultation period a document providing guidance, context and the process for submission will be distributed to all schools.

# 7 Appendices

7.1 A summary of appendices has been provided in table 4.

# **Table 4 Summary of Appendices**

Α	Growth Fund 2017/18 & 2018/9
B (i)	RBWM Local Formula 2017/18 & National Funding Formula and ACA
B (ii)	RBWM Local Formula Options 2018/19
С	Movement on Funding from RBWM Local Formula to Models
D (i)	RBWM Local Formula Model 1 – Infant, First & Junior Schools
D (ii)	RBWM Local Formula Model 1 – Primary Schools
D (iii)	RBWM Local Formula Model 1 – Secondary & Middle Schools
E (i)	RBWM Local Formula Model 2 – Infant, First & Junior Schools
E (ii)	RBWM Local Formula Model 2 – Primary Schools
E (iii)	RBWM Local Formula Model 2 – Secondary & Middle Schools
F (i)	RBWM Local Formula Model 3 – Infant, First & Junior Schools
F (ii)	RBWM Local Formula Model 3 – Primary Schools
F (iii)	RBWM Local Formula Model 3 – Secondary & Middle Schools

School Growth Funding		Financial Year 2017-18	Indicative 2018-19
		Sept - March	Sept - March
		£	£
<u>Primary</u>			
Holyport CE	Academy	8,432	-
St Edmund Campion	Academy	8,432	-
Wraysbury Primary		8,432	-
Oldfield Primary		21,218	21,218
Clewer Green CE		15,086	-
St Edwards Catholic First		15,086	-
Riverside Primary		25,088	25,088
All Saints CE Jnr		31,409	-
Knowl Hill	Academy	35,577	35,577
Cheapside Primary	4 classes	142,308	
Secondary			
Furze Platt Snr	Academy	35,577	35,577
Charters	Academy	35,577	35,577
Cox Green	Academy	35,577	35,577
Windsor Boys School	Academy	35,577	35,577
Windsor Girls School	Academy	35,577	35,577
Dedworth phase 1	Academy	35,577	35,577
Dedworth Phase 2	Academy	-	35,577
	Sub total	524,530	330,922
Contingency 1 - FP Senior phase 2			35,577
Contingency 2			35,577
	Total	524,530	402,076
Budget 2017-18		500,000	
Overspend		24,530	

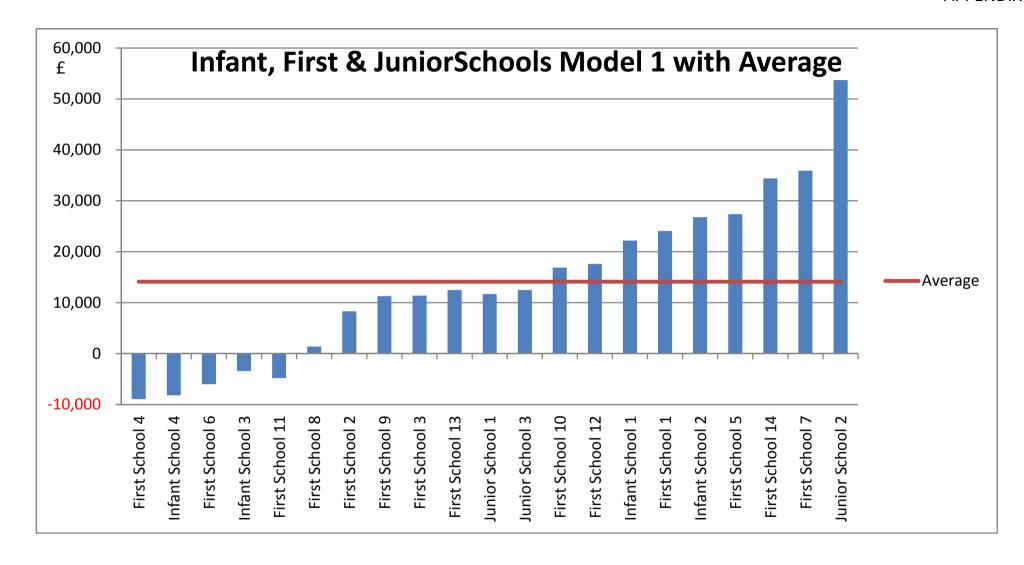
Age Weighted Pupil Unit (AWPU)  Primary (Years R-6)  Key Stage 3 (Years 7-9)  Key Stage 4 (Years 10-11)	pupil 2,880.00	£ Secondary amount per pupil  3,950.00 4,502.00	£ Allocations 32,229,840 18,110,750	ACA £ Primary amount per pupil 2,901.19	1.05613 £ Secondary amount per pupil	£ Allocations	£ Primary amount per	£
Age Weighted Pupil Unit (AWPU)  Primary (Years R-6)  Key Stage 3 (Years 7-9)  Key Stage 4 (Years 10-11)  DEPRIVATION - Income Deprivation Affecting	Primary amount per pupil 2,880.00	Secondary amount per pupil 3,950.00	Allocations 32,229,840	Primary amount per pupil	Secondary amount per			
Age Weighted Pupil Unit (AWPU)  Primary (Years R-6)  Key Stage 3 (Years 7-9)  Key Stage 4 (Years 10-11)  DEPRIVATION - Income Deprivation Affecting	pupil 2,880.00	<b>pupil</b> 3,950.00	32,229,840	, , , , ,	*	Allocations	Brimary amount nor	Casandamic
Key Stage 3 (Years 7-9) Key Stage 4 (Years 10-11)  DEPRIVATION - Income Deprivation Affecting	·			2,901.19			pupil	Secondary amount per pupil
Key Stage 4 (Years 10-11)  DEPRIVATION - Income Deprivation Affecting	Primary amount per		18,110,750			32,648,542	21.19	
DEPRIVATION - Income Deprivation Affecting	Primary amount per	4,502.00			4,079.83	18,746,819		129.83
-	Primary amount per		13,704,088		4,632.19	14,165,237		130.19
Children & Eron School Moole		Secondary amount per			Secondary amount per		Primary amount per	Secondary amount per
Cililatell & Free School Meals	pupil	pupil		Primary amount per pupil	pupil		pupil	pupil
FSM	0.00	0.00	2,926,738	464.70	464.70	3,079,053	464.70	464.70
FSM6	696.80	604.50		570.31	829.06		-126.49	224.56
IDACI Band F	398.19	466.31		211.23	306.28		-186.96	-160.03
IDACI Band E	517.65	606.20		253.47	411.89		-264.18	-194.31
IDACI Band D IDACI Band C	776.48 776.48	909.31 909.31		380.21 411.89	543.91 591.43		-396.27 -364.59	-365.40 -317.88
				443.57	633.68			
IDACI Band B	776.48						-332.91	-275.63
IDACI Band A	776.48	909.31		607.27	855.47		-169.21	-53.84
DEPRIVATION- Looked After Children & English	Primary amount per	Secondary amount per			Secondary amount per		Primary amount per	Secondary amount per
as an additional Language	pupil	pupil		Primary amount per pupil	pupil		pupil	pupil
LAC X March 16	1,900.00	1,900.00	80,367	0	pupii O	-	-1,900	-1,900
EAL 3 Primary	323.13	2,500.00	374,996	543.91	,	637,341	221	-/
		987.92	188,077		1,462.74	278,866		475
***								
DEPRIVATION - LOW PRIOR ATTAINMENT	Weighting	Amount per pupil		Weighting	Amount per pupil		Primary amount per pupil	Secondary amount per pupil
Low Attainment % new EFSP	0.40			1.00				
Low Attainment % old FSP 78		1,951.20	2,710,942		1,108.94	3,208,879	-842.26	
Secondary low attainment (year 7)	0.48	1,654.61	2,425,005	0.48	1,637.00	2,405,706		-17.61
<u> </u>								
LUMP SUM	ump Sum per Primary School	Lump Sum per Secondary School		Lump Sum per Primary School	Lump Sum per Secondary School		Lump Sum per Primary School	Lump Sum per Secondary School
7) Lump Sum	123,738.00	125,155.00	7,441,284	116,174.30	116,174.30	6,970,458	-7,563.70	-8,980.70
8) Sparsity factor	0.00	0.00	7,112,201	26,403	68,648	3,373,133	26,403.25	,
	•	•		, and the second	,			
Fc	ormula Total		80,192,087	Formula Total		82,140,901		
	lates		693,250	Rates - at 17-18 Cost		693,250		
M	AFG Balance ( non scaled of	element)	-	MFG Balance @ 1.5% ( non sca		137,625		
	Total	_	80,885,337	Total ( excluding individual scho	ool 'floor' protection)	82,971,776		
	Ratio	1:1.27		Ratio	1:1.30			
N	MFG Cost ( pre scaling) Primary Secondary	£ 263,259 39,882	Number of Schools 12 2	MFG Cost ( pre scaling) Primary Secondary	£ 137,675 0	Number of Schools 6 -		

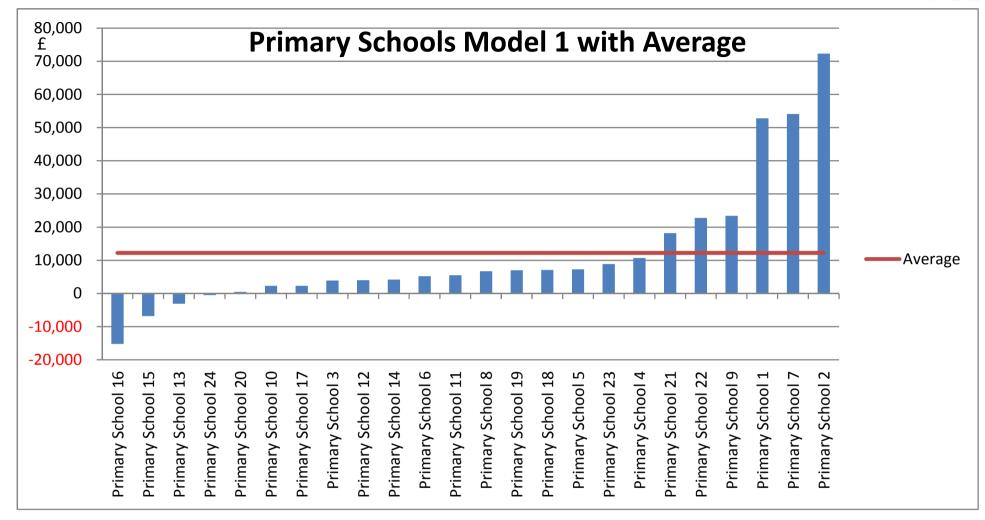
RBWM Local Formula Options 2018-19	Model 1			Model 2		Model 3			
	£	£	£	£	£	£	£	£	£
AWPU	Primary amount per pupil	Secondary amount per pupil	Allocations	Primary amount per pupil	Secondary amount per pupil	Allocations	Primary amount per pupil	Secondary amount per pupil	Allocations
Primary (Years R-6)	2,892.71		32,553,112	2,892.71		32,553,112	2,893.77		32,565,04
	2,892.71	4.027.00		2,892.71	4.027.00		2,893.77	4.024.20	18,538,02
Key Stage 3 (Years 7-9)		4,027.90	18,508,201		4,027.90	18,508,201		4,034.39 4,586.62	
Key Stage 4 (Years 10-11)		4,580.11	14,005,976		4,580.11	14,005,976		4,586.62	14,025,88
	Primary amount per	Secondary amount			Secondary amount per			Secondary amount per	
DEPRIVATION - IDACI & FSM	pupil	per pupil		Primary amount per pupil	pupil		Primary amount per pupil	pupil	
FSM	348.52	348.52	3,044,109	302.05	302.05	3,030,134	464.70	464.70	3,079,04
FSM6	601.93	772.92		614.58	750.47		570.31	829.06	
IDACI Band F	257.97	346.29		276.66	362.29		211.23	306.28	
IDACI Band E	319.52	460.47		345.93	479.90		253.47	411.89	
IDACI Band D	479.28	635.26		518.90	671.80		380.21	543.91	
IDACI Band C	503.04	670.90		539.50	702.69		411.89	591.43	
IDACI Band B	526.80	702.59		560.09	730.15		443.57	633.68	
IDACI Band A	649.58	868.93		666.50	874.31		607.27	855.47	
	Primary amount per	Secondary amount			Secondary amount per			Secondary amount per	
EPRIVATION- Looked After Children & EAL	pupil	per pupil		Primary amount per pupil	pupil		Primary amount per pupil	pupil	
LAC X March 16	950.00	950.00	40,299	950.00	950.00	40,299	950.00	950.00	40,29
EAL 3 Primary	488.71		572,659	466.64		546,792	543.91		637,33
EAL 3 Secondary		1,344.04	256,237		1,296.55	247,183		1,462.74	278,86
DEPRIVATION - LOW PRIOR ATTAINMENT	Weighting	Amount per pupil		Weighting	Amount per pupil		Weighting	Amount per pupil	
Primary Low Attainment % new EFSP	0.81	Amount per pupir		0.75	Amount per pupii		0.955	Amount per pupii	
•	0.81	4 240 50	2 404 520	0.75	4 402 72	2 400 544	0.955	4 400 04	2.070.04
Primary Low Attainment % old FSP 78 Secondary low attainment (year 7)	0.48	1,319.50 1,641.40	3,191,529 2,412,172	0.48	1,403.73 1,643.16	3,190,544 2,414,759	0.48	1,108.94 1,637.00	3,078,94 2,405,70
Secondary low attainment (year 7)	0.46	1,041.40	2,412,172	0.46	1,043.10	2,414,735	0.46	1,037.00	2,403,70
	Lump Sum per Primary	Lump Sum per		Lump Sum per Primary	Lump Sum per		Lump Sum per Primary	Lump Sum per	
LUMP SUM	School	Secondary School		School	Secondary School		School	Secondary School	
7) Lump Sum	118,065.23	118,419.48	7,088,165	118,821.60	119,317.55	7,135,247	123,738.00	125,155.00	7,441,28
8) Sparsity factor	-	-	7,088,103	-	-	7,133,247	-	-	7,441,20
	•								
	Total Formula Funding	81,672,458.00		Total Formula Funding	81,672,246.00		Total Formula Funding	82,090,436.00	
	Rates 17-18 Budget	693,250.00		Rates 17-18 Budget	693,250.00		Rates 17-18 Budget	693,250.00	
	Total	82,365,708.00		Total	82,365,496.00		Total	82,783,686.00	
	Ratio	1:1.29		Ratio	1:1.28		Ratio	1:1.29	
							1		
	Balance	192		Balance	404		Balance	- 1,867	
	MFG Cost ( pre scaling)	£	No of Schools	MFG Cost ( pre scaling)	£	No of Schools	MFG Cost ( pre scaling)	£	No of Schools
	Primary in MFG	138,077.00	6	Primary in MFG	133,312.00	6	Primary in MFG	111,643.00	
	Secondary in MFG	441.00	1	Secondary in MFG	1,862.00	1	Secondary in MFG	-	-
Migration from Local Formula to NFF:	AWPU			AWPU			AWPU		
<u> </u>		ifference between			ference between RRWM		Migration at 65% of the di	fference between RBWM	
	Migration at 60% of the difference between RBWM 2017-18 local formula and NFF rates. Pupil Led Factors and Lump sums				Migration at 60% of the difference between RBWM				
				2017-18 local formula and NFF rates.  Pupil Led Factors and Lump sums			2017-18 local formula and Pupil Led Factors		
	Migration at 75% of the d	•	VM & NEE	Migration at 65% of the dif		2. NEE	100% Migration to NFF.		
	LAC to be phased out and		VIVI OX INFF.	LAC to be phased out and f		X INI C.	LAC to be phased out and		
							Lump sums as per 2017-18	3 rates	
Notes	MEG cot at 1 F9/			MEG cot at 1 F9/			MEG cot at 1 F9/		
Note:	MFG set at -1.5% 0.5% Contribution to High	Noods Condered C	ile	MFG set at -1.5% 0.5% Contribution to High	Monda Comine - 9 Prost		MFG set at -1.5%  Nil contribution to High No	oods somisos 0!-	

## Movement in Funding from 2017-18 Budgets to Models

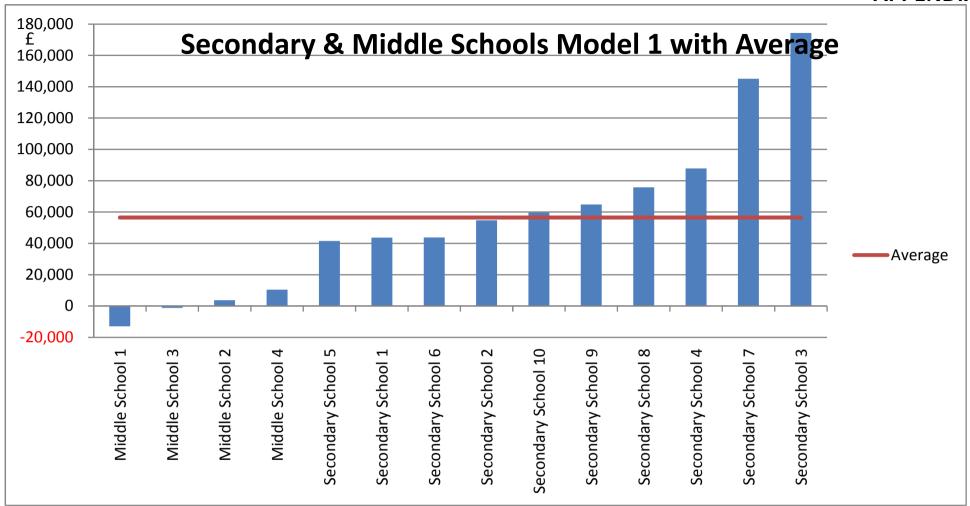
Anonomised Name	Model 1	Model 2	Model 3	
	£	£	£	
Primary School 16	(15,200)	(15,200)	(15,200)	
Middle School 1	(13,000)	(12,900)	(8,600)	
First School 4	(8,900)	(8,100)	(7,000)	
Infant School 4	(8,200)	(9,400)	1,500	
Primary School 15	(6,800)	(6,800)	(6,700)	
First School 6	(6,000)	(6,000)	(5,900)	
First School 11	(4,800)	(4,800)	(4,700)	
Infant School 3	(3,400)	(3,400)	(3,300)	
Primary School 13	(3,100)	(2,100)	1,500	
Middle School 3	(1,200)	1,600	1,300	
Primary School 24	(500)	1,200	(200)	
Primary School 20	500	900	5,800	
First School 8	1,400	1,900	6,200	
Primary School 10	2,300	3,300	5,100	
Primary School 17	2,300	2,900	6,800	
Middle School 2	3,700	7,500	3,300	
Primary School 3	3,900	4,200	9,700	
Primary School 12	4,000	5,300	6,000	
Primary School 14	4,200	4,600	9,500	
Primary School 6	5,200	5,700	9,000	
Primary School 11	5,500	6,100	10,700	
Primary School 8	6,700	6,900	13,100	
Primary School 19	7,000	7,200	12,500	
Primary School 18	7,100	7,000	13,000	
Primary School 5	7,300	7,700	11,900	
First School 2	8,300	8,400	14,300	
Primary School 23	8,900	9,900	11,200	
Middle School 4	10,500	12,500	15,400	
Primary School 4	10,700	11,100	15,000	
First School 9	11,300	11,000	17,900	
First School 3	11,400	11,700	15,900	
Junior School 1	11,700	13,000	12,900	
First School 13	12,500	12,400	18,300	
Junior School 3	12,500	13,200	14,700	
First School 10	16,900	16,400	24,300	
First School 12	17,600	17,900	20,700	
Primary School 21	18,200	17,900	23,600	
Infant School 1	22,200	21,400	29,100	
Primary School 22	22,800	23,100	28,700	
Primary School 9	23,400	25,600	21,800	
First School 1	24,100	23,900	30,700	
Infant School 2	26,800	25,900	34,300	
First School 5 First School 14	27,400	27,800	31,100	
First School 7	34,400	34,800	39,100	
Secondary School 5	35,900	34,300	44,500	
Secondary School 1	41,500 43,700	41,200 41,200	56,100 64,500	
Secondary School 6	43,800	42,500	60,500	
Primary School 1	52,800	52,400	57,300	
Junior School 2	53,700	55,900	54,700	
Primary School 7	54,100	54,000	60,500	
Secondary School 2	54,700	53,500	71,000	
Secondary School 10	59,600	57,600	78,800	
Secondary School 9	64,800	61,300	87,400	
Primary School 2	72,300	73,500	72,900	
Secondary School 8	75,800	73,400	99,000	
Secondary School 4	87,800	85,100	113,100	
Secondary School 7	145,100	142,300	171,000	
Secondary School 3	174,300	169,900	207,400	
,			,:00	
Growing School	98,900	98,900	105,000	
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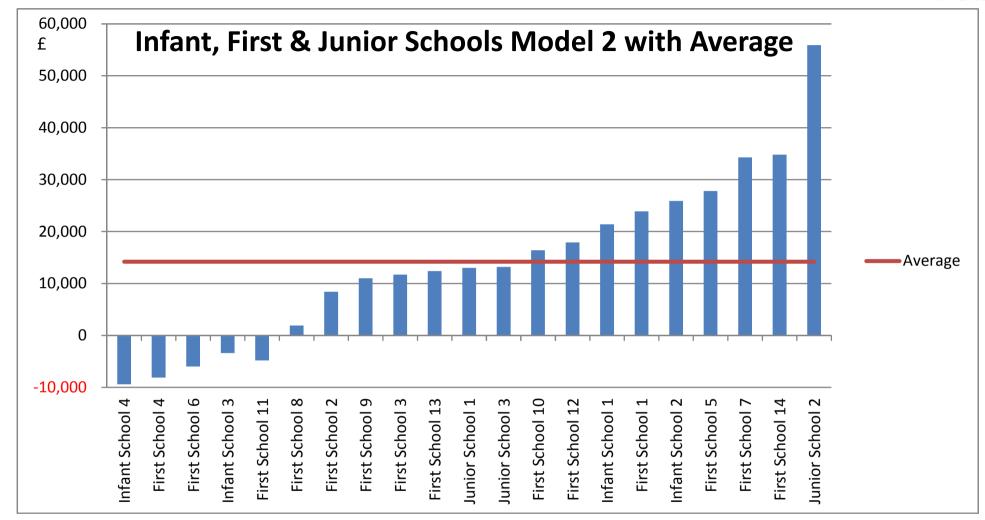
Note: Individual school figures are rounded to the nearest £100.



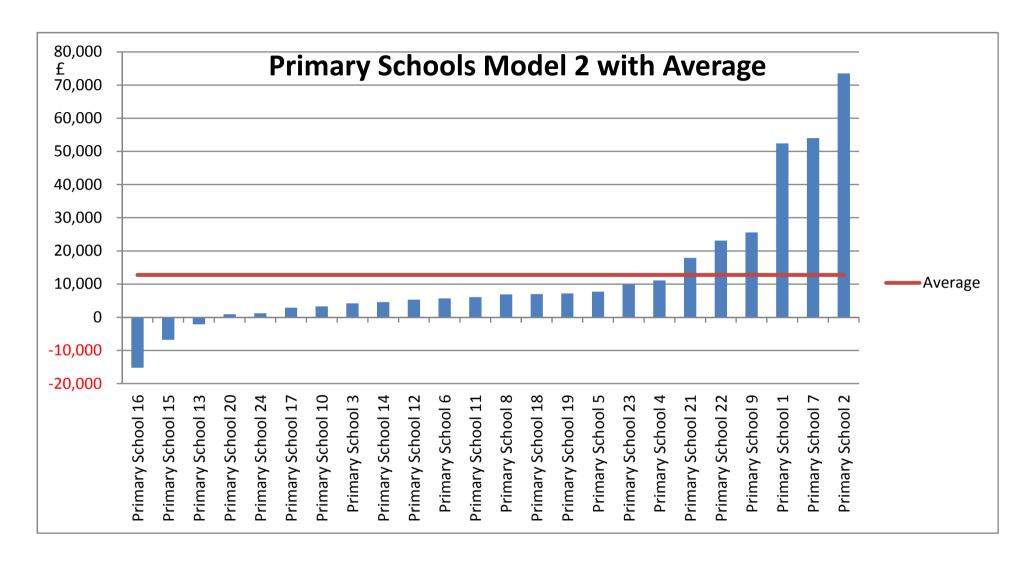


## **APPENDIX Diii**

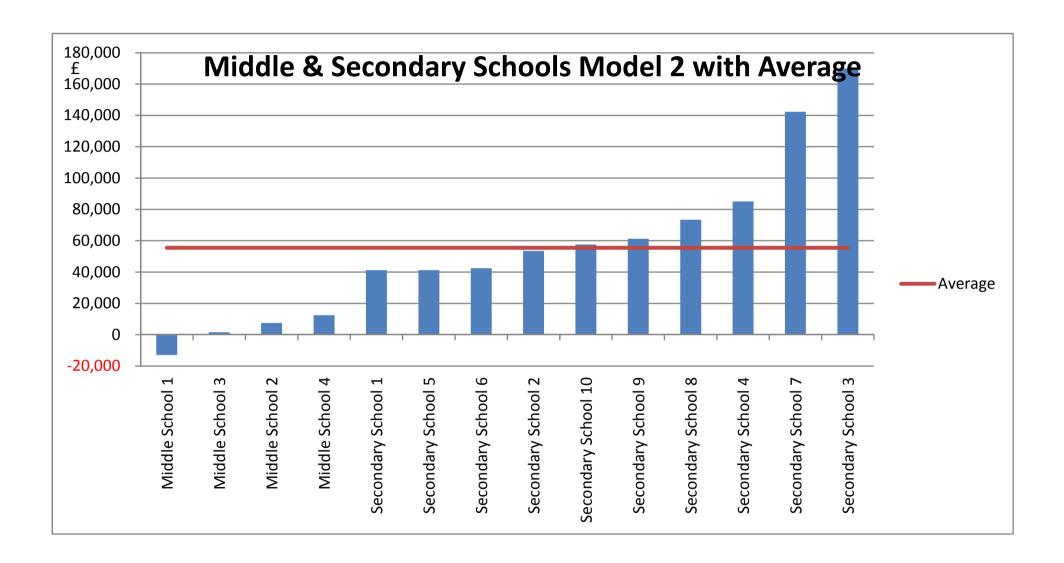




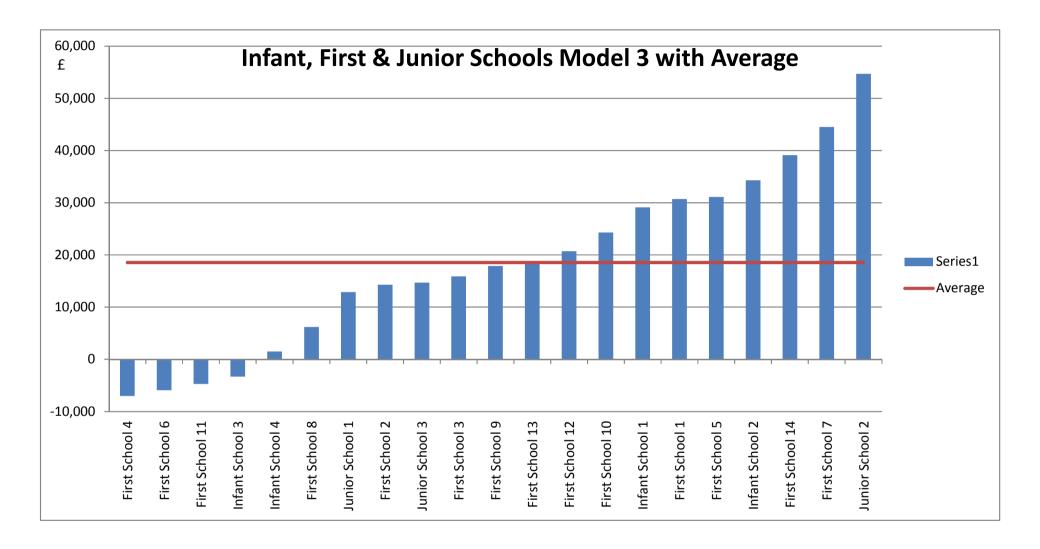
## **APPENDIX E ii**



# **APPENDIX E iii**



## **APPENDIX F i**



## **APPENDIX F ii**

