Addendum for Executive

Thursday 18 January 2018 at 5.00pm in the Roger Croft Room Council Offices Market Street Newbury

Part I

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School Funding Formula 2018/19 (EX3394) (CSP: BEC & BEC2) Purpose: The Council's Executive must agree on an annual basis the school funding formula for primary and secondary schools. This report sets out the proposal for the 2018/19 financial year.

Andy Day Head of Strategic Support

For further information about this item, or to inspect any background documents referred to in Part I reports, please contact Democratic Services Team on (01635) 519462 e-mail: <u>executivecycle@westberks.gov.uk</u>

Further information and Minutes are also available on the Council's website at <u>www.westberks.gov.uk</u>

West Berkshire Council is committed to equality of opportunity. We will treat everyone with respect, regardless of race, disability, gender, age, religion or sexual orientation.

If you require this information in a different format or translation, please contact Moira Fraser on telephone (01635) 519045.



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School Funding Formula 2018/19

Committee considering report:	Executive on 18 January 2018
Portfolio Member:	Councillor Lynne Doherty
Date Portfolio Member agreed report:	13 December 2017
Report Author:	Claire White
Forward Plan Ref:	EX3394

1. Purpose of the Report

1.1 The Council's Executive must agree on an annual basis the school funding formula for primary and secondary schools. This report sets out the proposal for financial year 2018/19.

2. Recommendations

- 2.1 That the school formula for 2018/19 is set as per the National Funding Formula factors and funding rates set out in paragraph 6.
- 2.2 For schools that gain funding under the new formula, additional funding is capped at 3% per pupil (as per the National Funding Formula).
- 2.3 For schools that lose funding under the new formula, a minimum funding guarantee of an additional 0.2% per pupil increase is applied (this is the maximum affordable).

3. Implications

- 3.1 **Financial:** Schools are funded by the ring fenced Dedicated Schools Grant (DSG) and the school formula allocations do not impact on the Council's own resources. However, the cost of unmanageable school deficits or closing schools may fall on the Council.
- 3.2 Policy: None.
- 3.3 **Personnel:** Real term reductions in funding allocations will inevitably lead to staffing restructures and possible redundancies in schools.
- 3.4 Legal: The allocation of funding to schools must comply with The Schools and Early Years Finance Regulations 2018.
- 3.5 **Risk Management:** For many schools their funding allocation will not increase by anywhere near the amount required to cover current increases in costs; the number of schools at risk of deficit will increase, and the non-viability of small schools may become a reality. It is imperative that the work which commenced in 2017/18 on supporting schools in financial difficulty continues.

- 3.6 **Property:** None.
- 3.7 **Other:** None.

4. Other options considered

4.1 The school formula can currently be set by using any of the formulae factors allowed for within the Schools and Early Years Finance Regulations, and at any funding rate subject to certain restrictions and affordability. These are set out in Annex B of Appendix C. This will apply for the next two years, after which every school will need to be funded according to the National Funding Formula. The only other option considered for 2018/19 was to set funding rates half way between the current rates and the national rates. However, more schools benefitted from moving straight onto the national rates.

Executive Summary

5. Introduction / Background

- In September 2017, the Government announced its school funding arrangements for the 2018/19 financial year and moving schools onto the National Funding Formula. Nationally, this included putting additional funding into the new formula so that no school should lose funding through these new arrangements. West Berkshire overall gains £1.3m on a like for like basis.
- For the first two financial years, this will operate as a "soft" formula. This means that the method of allocating funding to local authorities will be through the National Funding Formula factors and funding rates, though using 2016 data to determine an overall funding rate for primary and secondary. Local authorities will then still determine which formula factors to use and the funding rates, which has to be according to The Schools and Early Years Finance Regulations and using 2017 data. It should therefore be noted that the funding available for allocation is *not the same* as the National Funding Formula, and for some factors in the National Funding Formula, the calculation is not replicated in the Schools and Early Years Finance Regulations, and cannot be applied unless a disapplication request is approved by the Secretary of State for Education. It may therefore be impossible for local authorities to replicate the National Funding Formula in the first two years, even if it so wished.
- The consultation with Schools' Forum and all schools has confirmed that the preference is to move to the National Funding Formula factors and rates as far as it is possible. Further details are included in Appendices B and D.

6. Proposal

- The funding available dictates how close the National Funding Formula can be replicated. Based on the October 2017 census, the Schools Block funding (after deducting the required amount for growth funding and the estimated deficit due to business rate revaluations carried forward from 2017/18) totals £97.700m.
- This allows for the National Funding Formula factors and rates to be applied. An area cost adjustment (ACA) is added for some local authorities for West Berkshire Council this is 1.0341. The total cost of applying the national rates with the ACA, as shown in the table below, is £97.417m.

Factor	National Rate 2018/19	WBC National Rate (with ACA added)	Total Cost
1.Basic Entitlement:			
Primary	£2,747	£2,841	£37,822,233
Secondary KS3	£3,863	£3,995	£22,426,310
Secondary KS4	£4,386	£4,536	£15,954,130
2.Deprivation:			
Primary current FSM	£440	£455	
Primary FSM Ever 6	£540	£558	C2 CE1 224
Primary IDACI Band F (0.2 – 0.25)	£200	£207	£3,651,334
Primary IDACI Band E (0.25 – 0.3)	£240	£248	

Factor	National Rate 2018/19	WBC National Rate (with ACA added)	Total Cost
Primary IDACI Band D (0.3 – 0.4)	£360	£372	
Primary IDACI Band C (0.4 – 0.5)	£390	£403	
Primary IDACI Band B (0.5 – 0.6)	£420	£434	
Primary IDACI Band A (over 0.6)	£575	£595	
Secondary current FSM	£440	£455	
Secondary FSM Ever 6	£785	£812	
Secondary IDACI Band F	£290	£300	
Secondary IDACI Band E	£390	£403	
Secondary IDACI Band D	£515	£533	
Secondary IDACI Band C	£560	£579	
Secondary IDACI Band B	£600	£620	
Secondary IDACI Band A	£810	£838	
3.Prior Attainment:			
Primary	£1,050	£1,086	CC 714 419
Secondary	£1,550	£1,603	£6,714,418
4.English as an Additional Language:			
Primary EAL 3	£515	£532	£565,176
Secondary EAL 3	£1,385	£1,432	1505,170
5.Sparsity			
Primary	£25,000	£25,852	£04.027
Secondary	£65,000	£67,216	£94,027
6.Lump Sum:			
Primary	£110,000	£113,747	£9 611 772
Secondary	£110,000	£113,747	£8,644,772
7. Business Rates:			
Primary	17/18	£1 349 663	£1 /6/ 170
Secondary	estimate	£1,248,663	£1,464,179
TOTAL FUNDING REQUIRED			£97,336,579

- Sparsity funding for primary schools will be introduced for the first time. This will be calculated according to the School Finance Regulations (which tapers the gains according to number of pupils in the school), rather than the more generous calculation used by the National Funding Formula, and which requires approval by the Secretary of State for Education.
- As per the National Funding formula, schools gaining will have their additional funding capped at 3% per pupil. This reduces the total by £227,698.
- Schools losing will have a minimum funding guarantee of 0.1% increase per pupil. This will cost £599,460. This is the proposed balancing item, making the cost of this proposal (£97,708,341) just slightly over the funding available.
- The main reason why a 0.5% minimum funding guarantee cannot be afforded is due to the increase in business rates; the National Funding Formula was based on the 2017/18 estimate, which was £215k less than the 2018/19 estimate and which also did not include rating revaluations in 2017/18 of £106k.

- The impact on each individual school is set out in Appendix C. Where there is a negative impact, this is because pupil numbers have decreased (funding is protected at a per pupil level only, there is no funding floor). Where per pupil funding has decreased, this is because pupil numbers in the school have increased and the fixed lump sum is spread over more pupils. Overall, there is £1.7m of extra funding going into schools (total of £2.2m less £0.5m added for resource unit pupils, to compare like for like). Per pupil funding rates have increased by £72 in primary and £21 in secondary. Appendix D, in particular Annex A and C, show the impact on a like for like basis (i.e. assuming pupil numbers were the same).
- It is recommended that these proposals are agreed.

7. Conclusion

- The advantage of moving schools straight onto the National Funding Formula is that it gives schools certainty and stability moving forward.
- West Berkshire is in a position to move straight onto the National Funding Formula because: The previous West Berkshire funding rates are not significantly different; there has not been a significant difference between 2016 pupil characteristics used in the DSG funding allocation and the 2017 actual pupil characteristics that need to be funded in schools; there is only a minimal deficit in the schools block to be repaid from the 2018/19 allocation (this relates to the difference between budgeted and actual business rate allocations in the formula); the estimated requirements for growth funding in 2018/19 are not greater than the historical funding allocated within the DSG; there is **no** funding to be transferred from the schools block DSG to other funding blocks, including meeting pressures in the high needs block.
- However, as can be seen from Appendix C, the gains for most schools are not significant, and many will still have difficulty in balancing their individual budgets moving forward, particularly the 20 schools where pupil numbers have decreased and funding has gone down.

8. Appendices

- 8.1 Appendix A Equalities Impact Assessment
- 8.2 Appendix B Supporting Information
- 8.3 Appendix C 2018/19 School Formula Allocations Final (January 2018)
- 8.4 Appendix D Primary and Secondary Schools Funding Proposed Funding Arrangements for 2018/19. Briefing and Consultation Document for Schools November 2017.

Appendix A

Equality Impact Assessment - Stage One

We need to ensure that our strategies, polices, functions and services, current and proposed have given due regard to equality and diversity as set out in the Public Sector Equality Duty (Section 149 of the Equality Act), which states:

- "(1) A public authority must, in the exercise of its functions, have due regard to the need to:
 - (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
 - (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; this includes the need to:
 - (i) remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;
 - (ii) take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;
 - (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it, with due regard, in particular, to the need to be aware that compliance with the duties in this section may involve treating some persons more favourably than others.
- (2) The steps involved in meeting the needs of disabled persons that are different from the needs of persons who are not disabled include, in particular, steps to take account of disabled persons' disabilities.
- (3) Compliance with the duties in this section may involve treating some persons more favourably than others."

The following list of questions may help to establish whether the decision is relevant to equality:

- Does the decision affect service users, employees or the wider community?
- (The relevance of a decision to equality depends not just on the number of those affected but on the significance of the impact on them)
- Is it likely to affect people with particular protected characteristics differently?
- Is it a major policy, or a major change to an existing policy, significantly affecting how functions are delivered?
- Will the decision have a significant impact on how other organisations operate in terms of equality?
- Does the decision relate to functions that engagement has identified as being important to people with particular protected characteristics?
- Does the decision relate to an area with known inequalities?
- Does the decision relate to any equality objectives that have been set by the council?

Please complete the following questions to determine whether a full Stage Two, Equality Impact Assessment is required.

What is the proposed decision that you are asking the Executive to make:	To agree the school funding formula for 2018/19
Summary of relevant legislation:	School and Early Years Finance Regulations
Does the proposed decision conflict with any of the Council's key strategy priorities?	No
Name of assessor:	Claire White
Date of assessment:	27/11/17

Is this a:		Is this:	
Policy	No	New or proposed	Yes
Strategy	No	Already exists and is being reviewed	Yes
Function	No	Is changing	Yes
Service	No		

1 What are the main aims, objectives and intended outcomes of the proposed decision and who is likely to benefit from it?		
Aims:	To fund schools in a fair and equitable way	
Objectives:	To fund schools in a fair and equitable way	
Outcomes:	To fund schools in a fair and equitable way	
Benefits:	No school is unfairly disadvantaged	

2 Note which groups may be affected by the proposed decision. Consider how they may be affected, whether it is positively or negatively and what sources of information have been used to determine this.

(Please demonstrate consideration of all strands – Age, Disability, Gender Reassignment, Marriage and Civil Partnership, Pregnancy and Maternity, Race, Religion or Belief, Sex and Sexual Orientation.)

Group Affected	What might be the effect?	Information to support this
Age	N/A	
Disability	N/A	
Gender Reassignment	N/A	

Marriage and Civil Partnership	N/A	
Pregnancy and Maternity	N/A	
Race	N/A	
Religion or Belief	N/A	
Sex	N/A	
Sexual Orientation	N/A	
Further Comments relating to the item:		

3 Result	
Are there any aspects of the proposed decision, including how it is delivered or accessed, that could contribute to inequality?	No
Please provide an explanation for your answer:	
Will the proposed decision have an adverse impact upon the lives of people, including employees and service users?	No
Please provide an explanation for your answer:	

If your answers to question 2 have identified potential adverse impacts and you have answered 'yes' to either of the sections at question 3, or you are unsure about the impact, then you should carry out a Stage Two Equality Impact Assessment.

If a Stage Two Equality Impact Assessment is required, before proceeding you should discuss the scope of the Assessment with service managers in your area. You will also need to refer to the Equality Impact Assessment guidance and Stage Two template.

4 Identify next steps as appropriate:	
Stage Two required	
Owner of Stage Two assessment:	
Timescale for Stage Two assessment:	

Name: Claire White

Date: 27/11/17

Please now forward this completed form to Rachel Craggs, Principal Policy Officer (Equality and Diversity) (<u>rachel.craggs@westberks.gov.uk</u>), for publication on the WBC website.

School Funding Formula 2018/19 – Supporting Information

1. Introduction/Background

- 1.1 The school funding arrangements for 2018/19 include the introduction of the National Funding Formula (NFF). Additional funding has been put into the NFF meaning that no school should lose on a per pupil basis. For West Berkshire schools this is a significant improvement from the original proposal which had meant around half of West Berkshire schools would have seen a reduction in funding. The increase is approximately £1.3m in overall funding on a like for like basis; the actual increase is higher due to the increase in overall pupil numbers.
- 1.2 For the next two years the NFF will operate as a "soft" system this means that the local authority will receive a total allocation based on the National Funding Formula, and then allocate this out to schools according to a local formula, which is determined by the Council's Executive after consulting with all schools and the Schools' Forum. The local formula has to comply with the Schools and Early Years Finance Regulations. For some factors, these regulations do not match the NFF calculation method, and an application has to be made to the Secretary of State for Education to dis-apply the regulations if the local authority wishes to replicate exactly the NFF.
- 1.3 At the October meeting of the Schools' Forum it was agreed that their preferred strategy would be to replicate the National Funding Formula as close as possible with the funding available. It was on this basis that all schools were consulted.
- 1.4 The consultation document was emailed to all maintained and academy head teachers, Finance, and Chairs of Governors on Tuesday 31st October 2017, with a deadline for responses of Monday 20th November 2017.

2. Supporting Information

2.1 Appendix C contains the briefing and consultation document. This sets out the details on how the funding to be received by the local authority is calculated, the options available for distribution of this funding, rationale for the proposals, and impact/exemplification tables.

3. Feedback from the Consultation

- 3.1 Although there were a number of emails and telephone calls to clarify or discuss how certain elements of the formula work or to stress the impact on individual schools, there were only four formal responses to the consultation from Winchcombe, Brimpton, Kennet, and John O Gaunt. These responses agreed with the proposals.
- 3.2 The following points have also been made (either as part of the consultation response or as general comments):

- (1) Brightwalton School has raised an issue on the application of the sparsity factor for their school. Their next nearest school on which the distance criteria is based is Chaddleworth (1.8 miles), yet no pupils are taught on this site. In order to make an adjustment, an application would need to be made to the Secretary of State for Education and Schools' Forum would need to approve. The Schools' Forum decision on 11th December 2017 was to **not** allow such an adjustment, due to the fact that if Brightwalton closed, these pupils would then need to be taught on the Chaddleworth site which is less than the 2 mile criteria. However, the latest 2017 formula data shows that Brightwalton now meets the sparsity criteria, as the average distance has now increased to just over 2 miles.
- (2) Concern about how long the minimum funding guarantee will last into the future, and how reliant schools can be on this element of funding in their future planning.
- (3) Concern about the impact of the lowering of the lump sum on small schools, and the allocation of almost £100k sparsity funding to just a few small primary schools.
- (4) Although Nick Gibb stated that 'every school will see an increase in funding through the formula from 2018' this is clearly not the case for some West Berkshire schools.
- (5) West Berkshire should continue lobbying the Government for increased funding in order to enhance, or as a minimum maintain educational standards.
- 3.3 As there was much interest from schools on the formula allocation proposals, it can be concluded that the majority, if not all, were in agreement. Any disagreements would have been expressed through the consultation channel.

4. **Proposals**

- 4.1 As detailed in the consultation document, the proposal for the school formula in 2018/19 is based on the following principles, which were reaffirmed by Schools' Forum on 11th December 2017:
 - Use the NFF rates for every formula factor, applying a funding cap on gains of 3% per pupil and minimum funding guarantee of up to 0.5% per pupil subject to affordability. To apply a minimum funding guarantee of more than 0% would have required an application to the Secretary of State for Education, but the school funding regulations are now to be amended to allow for this.
 - If after the above, there is a shortfall or excess in funding, scale every formula factor upwards or downwards in order to match the final funding allocation available for distribution to schools.
- 4.2 At Schools Forum on 11th December 2017, the following amendment was agreed:

- Use the School Finance Regulations calculation for sparsity funding (which includes a taper rather than a minimum funding floor), and not apply to the Secretary of State for Education to use the NFF calculation. As sparsity is a new factor to be used for primary schools and is new money for eligible schools, this method will provide a lower level of funding initially. This addresses concern from other small primary schools that so much funding is to immediately be allocated to just the few schools that qualify for sparsity.
- 4.3 The actual funding allocation through the Schools Block Dedicated Schools Grant (DSG) was confirmed by the Government on 19th December 2017. The funding to be received for 2018/19 is £97.905m, calculated as follows:
 - Primary Unit of Funding (PUF): £3,874.53 x 13,313 pupils = £51.582m
 - Secondary Unit of Funding (SUF) £4,924.85 x 9,133 pupils = £44.979m
 - Plus allowance for growth funding £0.202m
 - Plus allowance for business rate funding £1.248m
 - Less expected carry forward of Schools' Block deficit from 2017/18 (due to in-year business rate revaluations) -£0.106m

It has been estimated that £0.205m is required for growth funding, which leaves £97,700m to be allocated to schools through the formula.

4.4 Applying the proposed principles, the actual funding will allow for the National Funding Formula rates to be applied, using a 3% cap on gains and 0.2% minimum funding guarantee. The reason a higher minimum funding guarantee cannot be applied is because the cost of business rates will increase and the funding received through the DSG is based on the 2017/18 original bill.

5. Conclusion

- 5.1 The reason it is possible to move West Berkshire schools straight onto the NFF is because: the previous West Berkshire funding rates are not significantly different; there has not been a significant difference between 2016 pupil characteristics used in the DSG funding allocation and the 2017 actual pupil characteristics that need to be funded in schools; there is only a minimal deficit in the schools block to be repaid from the 2018/19 allocation (this relates to the difference between budgeted and actual business rate allocations in the formula which are funded at cost); the estimated requirements for growth funding in 2018/19 are not greater than the historical funding allocated within the DSG; there is **no** funding to be transferred from the schools block DSG to other funding blocks, including meeting pressures in the high needs block.
- 5.2 Many local authorities are having to use a half way position due to: a significant difference between their current and new funding rates; needing to use school block funding towards high needs block service demands and deficits; and significant growth (new school) requirements.

- 5.3 Moving schools immediately onto the National funding Formula rates will give West Berkshire schools some certainty and stability on their funding moving forward.
- 5.4 Although all schools will see an increase to their pupil led funding, for many the increase is minimal and nowhere near the level of inflation, and these schools will continue to struggle to set a balanced budget. Small schools in particular will see an impact, and the future viability of many is questionable. It is likely that the number of schools in deficit will increase, where they do not act fast enough to make the necessary structural changes.

6. Consultation and Engagement

- 6.1 All maintained and academy schools received the consultation document (Head Teacher, Finance, Chair of Governors).
- 6.2 Schools' Forum on 30th October 2017 and 11th December 2017.

Background Papers:

National Funding Formula for Schools and High Needs Policy Paper (ESFA September 2017) both available at:

https://www.gov.uk/guidance/pre-16-schools-funding-guidance-for-2018-to-2019

DSG 2018 to 2019 allocations tables available at:

https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-2018-to-2019

School Forum papers and minutes available at: http://decisionmaking.westberks.gov.uk/ieListMeetings.aspx?Cld=335&Year=0

Subject to Call-In:

Yes: 🗌 No: 🖂

The item is due to be referred to Council for final approval	
Delays in implementation could have serious financial implications for the Council	
Delays in implementation could compromise the Council's position	
Considered or reviewed by Overview and Scrutiny Management Commission or associated Task Groups within preceding six months	
Item is Urgent Key Decision	\bowtie
Report is to note only	
Wards affected:	
All	
Other to all a Alinean and Daile aities Orange and all	

Strategic Aims and Priorities Supported:

The proposals will help achieve the following Council Strategy aim:

BEC – Better educated communities

The proposals contained in this report will help to achieve the following Council Strategy priority:

BEC2 – Close the educational attainment gap

Officer details:	
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Appendix C

2018/19 School Formula Allocations - Final (January 2018) National Formula Funding Rates and 0.2% MFG

			7/18 ACTU ATION (in MFG)		2018/19 ALLOCATION (prior to MFG)			· · · · · ·					Total Funding	Overall Change				
st tre	SCHOOL	Formula Budget	Pupil No's (Oct 2016)	Per Pupil Funding	Formula Budget	Pupil No's (Oct 2017)	Per Pupil Funding	Formula Budget	Pupil Numbers	Per Pupil funding	MFG 0.10%	CAP 3%	TOTAL	2018/19	Including Transition Funding		Per Pupil Funding	%
	Aldermaston Church of England Primary School	729,665	185	3,944.14	652,140	158	4,127.47	-77,526	-27	183.33	0	0	0	652,140	-77,526	-10.6%	183.33	4
	Basildon Church of England Primary School Beedon Church of England Controlled Primary School	574,121 283,256	143 46	4,014.83 6,157.75	590,501 277,099	142 49	4,158.46 5,655.09	16,380 -6,157	-1 3	143.63 -502.66	0 17,851	-3,006 0	-3,006 17,851	587,496 294,950	13,375 11,694	2.3%	122.46 -138.36	3.
	Beenham Primary School	395,997	82	4,829.23	365,095	73	5,001.30	-30,902	-9	172.07	2,843	0	2,843	367,938	-28,059	-7.1%	211.02	
	Birch Copse Primary School	1,449,809	424	3,419.36	1,459,568	422	3,458.69	9,759	-2	39.33	0	0	0	1,459,568	9,759	0.7%	39.33	1.
	Bradfield Church of England Primary School Brightwalton Church of England Aided Primary School	573,436 429,227	142 100	4,038.28 4,292.27	587,169 423,895	145 94	4,049.44 4,509.53	13,733 -5,332	3 -6	11.16 217.25	0	0 -4,106	0 -4,106	587,169 419,789	13,733 -9,438	2.4% -2.2%	11.16 173.57	0. 4.
	Brimpton Church of England Primary School	300,320	50	6,006.39	298,081	56	5,322.87	-2,239	6	-683.52	25,201	0	25,201	323,282	22,962	7.6%	-233.51	-3.
00	Bucklebury Church of England Primary School	530,934	129	4,115.77	508,452	120	4,237.10	-22,482	-9	121.33	0	0	0	508,452	-22,482	-4.2%	121.33	2
	Burghfield St. Mary's Church of England Primary School Calcot Infant School & Nursery	775,875 914,479	206 230	3,766.38 3,976.00	785,636 856,468	211 219	3,723.39 3,910.81	9,761 -58,011	5 -11	-42.99 -65.18	7,844 26,202	0	7,844 26,202	793,480 882,670	17,605 -31,809	2.3% -3.5%	-5.81 54.46	-0. 1.
	Calcot Junior School	1,098,192	279	3,936.17	1,190,389	288	4,133.30	92,197	9	197.12	0	-26,329	-26,329	1,164,060	65,868	6.0%	105.70	2
	Chaddleworth St. Andrew's Church of England Primary Sch	227,955	29	7,860.53	210,101	25	8,404.05	-17,854	-4	543.52	2,881	0	2,881	212,982	-14,973	-6.6%	658.77	8
	Chieveley Primary School Cold Ash St. Mark's Church of England Primary School	782,595 732,690	209 197	3,744.48 3,719.24	774,359 712,658	206 190	3,759.02 3,750.83	-8,237 -20,033	-3 -7	14.55 31.59	2,087 2,151	0	2,087 2,151	776,446	-6,150 -17,881	-0.8% -2.4%	24.68 42.91	0.
	Compton Church of England Primary School	709,864	185	3,837.10	717,212	185	3,876.82	7,347	0	39.71	0	0	0	717,212	7,347	1.0%	39.71	1.
	Curridge Primary School	442,540 787,208	103 209	4,296.51 3,766.54	431,197 830,132	101 215	4,269.28 3,861.08	-11,343 42,925	-2 6	-27.23 94.54	6,738 0	0	6,738 0	437,935 830,132	-4,605 42,925	-1.0% 5.5%	39.48 94.54	0.
	Downsway Primary School Enborne Church of England Primary School	331,691	209	5,102.94	318,086	215	5,214.53	42,925	-4	94.54	812	0	812	318,898	-12,793	-3.9%	94.54	2
00	Englefield Church of England Primary School	425,512	98	4,341.96	432,332	102	4,238.55	6,820	4	-103.41	6,989	0	6,989	439,321	13,809	3.2%	-34.89	-0
	Falkland Primary School Fir Tree Primary School & Nursery	1,508,264 804,033	450 191	3,351.70 4,209.60	1,566,117 818,766	453 197	3,457.21 4,156.17	57,854 14,732	3	105.52 -53.43	0 9,198	-2,330 0	-2,330 9,198	1,563,787 827,964	55,524 23,931	3.7% 3.0%	100.37 -6.74	3
	Francis Baily Primary School	1,876,252	541	3,468.12	1,934,596	550	3,517.45	58,344	6	49.33	9,190	0	9,190	1,934,596	58,344	3.1%	49.33	-0 1
00	Garland Junior School	837,818	217	3,860.91	869,087	216	4,023.55	31,268	-1	162.63	0	-9,380	-9,380	859,707	21,889	2.6%	119.21	3
	Hampstead Norreys Church of England Primary School	404,801	88	4,600.01	393,561	85	4,630.14	-11,239	-3	30.13	3,431	0	3,431 0	396,992	-7,808	-1.9%	70.49	•
	Hermitage Primary School Hungerford Primary School	748,123 1,410,500	193 392	3,876.29 3,598.22	761,675 1,429,571	195 384	3,906.03 3,722.84	13,552 19,070	2 -8	29.74 124.63	0	-2,491	-2,491	761,675	13,552 16,580	1.8%	29.74 118.14	
00	The Ilsleys' Primary School	302,308	57	5,303.66	343,307	69	4,975.46	40,998	12	-328.20	0	0	0	343,307	40,998	13.6%	-328.20	-4
	Inkpen Primary School	363,081	76	4,777.38	369,447	79	4,676.55	6,366	3	-100.83	4,443 0	0	4,443	373,890	10,809	3.0%	-44.59	-
	John Rankin Infant & Nursery School John Rankin Junior School	959,362 1,025,077	260 280	3,689.86 3,660.99	968,875 1,171,817	258 313	3,755.33 3,743.82	9,512 146,740	-2 33	65.47 82.83	0	0 -7,893	-7,893	968,875 1,163,923	9,512 138,846	1.0% 13.5%	65.47 57.62	
00	Kennet Valley Primary School	779,143	194	4,016.20	843,716	202	4,176.81	64,573	8	160.61	0	-13,444	-13,444	830,272	51,129	6.6%	94.06	
	Kintbury St. Mary's Church of England Primary School	590,929 793,951	140 196	4,220.92 4,050.77	650,344 804,965	162 184	4,014.47 4,374.81	59,416 11.014	22 -12	-206.45 324.04	17,880	0 -28,249	17,880 -28,249	668,224 776,715	77,296	13.1% -2.2%	-96.08 170.51	-
	Lambourn Church of England Primary School	793,951	208	3,743.74	802,855	209	3,841.41	24,156	-12	97.67	0	-20,249	-20,249	802,855	24,156	3.1%	97.67	
00	Mortimer St. Johns Church of England Infant School	692,545	181	3,826.22	689,372	174	3,961.91	-3,173	-7	135.69	0	0	0	689,372	-3,173	-0.5%	135.69	
	Mortimer St. Mary's Church of England Junior School	802,498	216 169	3,715.27 4,042.59	809,931	216 171	3,749.68 4,175.10	7,433 30,744	0	34.41 132.50	0	0	0	809,931 713,942	7,433 30,744	0.9%	34.41 132.50	
	Mrs. Bland's Infant & Nursery School Pangbourne Primary School	683,198 785,442	205	4,042.59	713,942 788,743	198	4,175.10	30,744	-7	152.50	0	-1,180	-1,180	713,942	2,121	4.5%	132.50	
00	Parsons Down Infant School	818,920	217	3,773.83	776,478	198	3,921.60	-42,443	-19	147.78	0	0	0	776,478	-42,443	-5.2%	147.78	
	Parsons Down Junior School Purley Church of England Primary School	1,128,047 486,276	308 112	3,662.49 4,341.75	1,116,849 502,145	293 113	3,811.77 4,443.76	-11,198 15,869	-15 1	149.28 102.01	0	-3,868 -1,273	-3,868 -1,273	1,112,981 500,872	-15,067 14,596	-1.3% 3.0%	136.08 90.74	
	Robert Sandilands Primary School & Nursery	957,081	246	3,890.57	974,537	240	4,060.57	17,457	-6	170.00	0	-9,025	-9,025	965,512	8,432	0.9%	132.40	
	Shaw-cum-Donnington Church of England Primary School	471,877	94	5,019.96	416,831	90	4,631.46	-55,046	-4	-388.51	41,592	0	41,592	458,423	-13,454	-2.9%	73.62	
	Shefford Church of England Primary School Speenhamland Primary School	237,283 1,062,242	29 281	8,182.16 3,780.22	274,308 1,133,879	39 287	7,033.54 3,950.80	37,025 71,637	10 6	-1,148.63 170.58	0	0 -21,393	0 -21,393	274,308 1,112,486	37,025 50,244	15.6% 4.7%	-1,148.63 96.04	-1
	Springfield Primary School	1,079,845	301	3,587.53	1,107,570	303	3,655.35	27,725	2	67.82	0	0	0	1,107,570	27,725	2.6%	67.82	
00	Spurcroft Primary School	1,556,195	433	3,593.98	1,695,930	463	3,662.92	139,735	30	68.93	0	0	0	1,695,930	139,735	9.0%	68.93	
	St. Finian's Catholic Primary School St. John the Evangelist Infant & Nursery School	736,784 684,718	197 180	3,740.02 3,803.99	727,472 687,222	187 179	3,890.22 3,839.23	-9,313 2,505	-10 -1	150.20 35.24	0	-3,875 0	-3,875 0	723,597	-13,188 2,505	-1.8% 0.4%	129.48 35.24	
00	St. Joseph's Catholic Primary School	804,463	210	3,830.78	825,367	202	4,085.97	20,904	-8	255.20	0	-26,270	-26,270	799,097	-5,366	-0.7%	125.15	
	St. Nicolas Church of England Junior School	940,120	258	3,643.88	948,658	258	3,676.97	8,537	0	33.09	0	0	0	948,658	8,537	0.9%	33.09	L
	St. Pauls Catholic Primary School Stockcross Church of England Primary School	1,144,663 428,993	325 101	3,522.04 4,247.46	1,218,048 422,366	326 101	3,736.34 4,181.85	73,385 -6,627	1	214.30 -65.61	0 7,443	-38,258 0	-38,258 7,443	1,179,790 429,810	35,127 816	3.1% 0.2%	96.95 8.08	
	Streatley Church of England Voluntary Controlled Primary S	436,667	98	4,455.78	441,822	102	4,331.59	5,155	4	-124.19	10,296	0	10,296	452,118	15,451	3.5%	-23.25	
	Sulhamstead and Ufton Nervet Church of England Voluntan Thatcham Park Church of England Primary School	434,635 1,383,731	101 385	4,303.32 3,594.11	455,533 1,405,426	107 377	4,257.32 3,727.92	20,898 21,695	6 -8	-46.00 133.82	0	0 -6,842	0 -6,842	455,533 1,398,584	20,898 14,853	4.8%	-46.00 115.67	
	Theale Church of England Primary School	995,698	275	3,620.72	1,405,420	298	3,607.66	79,384	23	-13.02	7,201	-0,042	7,201	1,082,283	86,585	8.7%	11.10	
00	Welford and Wickham Church of England Primary School	420,488	94	4,473.27	432,926	95	4,557.12	12,439	1	83.85	0	0	0	432,926	12,439	3.0%	83.85	
	Westwood Farm Infant School Westwood Farm Junior School	677,419 824,671	172 219	3,938.48 3,765.62	718,218 874,977	180 230	3,990.10 3,804.25	40,799 50,307	8	51.62 38.63	0	0	0	718,218 874,977	40,799 50,307	6.0% 6.1%	51.62 38.63	
	Whitelands Park Primary School	1,165,957	316	3,689.74	1,185,472	314	3,775.39	19,514	-2	85.65	0	0	0	1,185,472	19,514	1.7%	85.65	
	The Willows Primary School	1,353,646	344	3,935.02	1,495,873	358	4,178.42	142,227	14	243.40	0	-18,486	-18,486	1,477,386	123,740	9.1%	191.76	
	The Winchcombe School Woolhampton Church of England Primary School	1,574,421 411,519	390 92	4,036.98 4,473.03	1,614,677 401,786	430 92	3,755.06 4,367.24	40,256 -9,733	40	-281.91 -105.79	114,550 10,745	0	114,550 10,745	1,729,227 412,531	154,806 1,012	9.8% 0.2%	-15.52 11.00	
	Yattendon Church of England Primary School	359,866	73	4,929.67	364,752	74	4,929.09	4,887	1	-0.58	0	0	0	364,752	4,887	1.4%	-0.58	
00	Denefield School	4,561,016	919	4,963.02	4,679,455	951	4,920.56	118,439	32	-42.46	47,307	0	47,307	4,726,762	165,746	3.6%	7.29	
	The Downs School John O'Gaunt Community Technology College	4,265,350 1,859,398	898 336	4,749.83 5,533.92	4,237,109 1,936,459	901 355	4,702.67 5,454.82	-28,240 77,061	3 19	-47.16 -79.11	51,267 22,711	0	51,267 22,711	4,288,376 1,959,170	23,027 99,772	0.5%	9.74 -15.13	
00	Kennet School	6,617,820	1,362	4,858.90	6,913,008	1,417	4,878.62	295,188	55	19.72	0	0	0	6,913,008	295,188	4.5%	19.72	
	Little Heath School	6,211,648	1,281	4,849.06	6,321,560	1,289	4,904.24	109,911	8	55.17	0	0	0	6,321,560	109,911	1.8%	55.17	
	Park House School St. Bartholomew's School	3,924,019 6,109,196	793 1,264	4,948.32 4,833.22	3,964,311 6,038,747	800 1,274	4,955.39 4,739.99	40,292	7	7.07 -93.24	16,229 73,488	0	16,229 73,488	3,980,540 6,112,235	56,521 3,039	1.4%	27.35 -35.55	
	Theale Green School	2,717,548	537	4,033.22	2,403,780	461	4,739.99	-70,450 -313,768	-76	153.66	13,400	0	13,400	2,403,780		-11.5%	-35.55 153.66	
00	Trinity School & Performing Arts College	3,805,268	740	5,142.25	4,190,804	813	5,154.74	385,536	73	12.49	0	0	0	4,190,804	385,536	10.1%	12.49	
00	The Willink School	4,207,766	862	4,881.40	4,205,886	872	4,823.26	-1,881	10	-58.14	60,079	0	60,079	4,265,965	58,198	1.4%	10.76	
	PRIMARY TOTAL	51,217,617	13,216	3,875.42	52,445,462	13,313	3,939.42	1,227,845	97	63.99	328,378	-227,698	100,680	52,546,142	1,328,525	2.6%	71.55	
	SECONDARY TOTAL	44,279,029	8,992	4,924.27	44,891,118	9,133	4,915.27	612,088	141	-9.00	271,081	0	271,081	45,162,199	883,169	2.0%	20.68	
	TOTAL ALL SCHOOLS	95,496,646	22,208	4,300.10	97,336,579	22,446	4,336.48	1,839,933	238	36.38	599,459	-227,698	371,761	97,708,341	2,211,695	2.3%	52.94	

Appendix D

School Formula Consultation Document



Primary and Secondary Schools Funding Proposed Funding Arrangements for 2018/19

Briefing & Consultation Document for Schools November 2017

1. Introduction

- 1.1 The Department for Education (DfE) has held two consultations since March 2016, with the intention of reforming school funding and introducing a National Funding Formula (NFF). The premise is that all schools will be funded on the same basis and pupils with similar characteristics and similar needs will attract similar levels of funding regardless of where they live. This means that the funding rates for each of the current formula factors will be set nationally rather than by each individual local authority. In order to achieve this, funding would shift from higher funded local authorities to the lower funded ones.
- 1.2 Under the Government's proposals for a NFF set out in the second stage consultation earlier this year, West Berkshire overall did not gain additional funding, but funding moved between schools due to the national weightings of each factor being different to the West Berkshire rates. This meant just under half of West Berkshire schools gained funding, and just over half lost.
- 1.3 Various announcements have been made by the Secretary of State for Education over the summer. In September 2017, the outcomes of the second stage consultation were published alongside policy and operational documents relating to the 2018 schools budget, and the implementation of the NFF from April 2018. These can be accessed on this webpage:

https://www.gov.uk/government/publications/national-funding-formula-forschools-and-high-needs

1.4 Following numerous representations that there was not enough funding in the system, the Government is adding an additional £2.6 billion into education funding over the next two years, rising to a total of £43.5 billion in 2019/20. Additional funding is therefore being put into the NFF including protecting

schools that were due to lose, so that no school should lose funding on a per pupil basis compared to their baseline.

- 1.5 For at least the next two years, the formula will operate as a "soft" formula. This means that the Government will allocate funding based on the NFF to each local authority, and the decision will be taken locally on how best to allocate this funding to schools through the factors. A "hard" formula means that schools will receive their funding allocations direct from the Government using the NFF rates.
- 1.6 The method of distributing the funding will need to go out to consultation with all schools and be agreed by Schools' Forum in December, before being approved by the Council's Executive in January.
- 1.7 This document provides a briefing on the proposed local arrangement for 2018/19. Schools are invited to make comments on five specific areas, as highlighted in boxes within the text. Please e-mail your response to Claire White, Schools' Finance Manager <u>claire.white@westberks.gov.uk</u> by 20th November 2017. In order for the Schools' Forum to consider a suggestion for change, it should be accompanied by clear rationale on why your proposal is a better solution and fair and equitable for all schools in West Berkshire Council (WBC), and not just for your own individual school. You should also check that it falls within the current funding regulations.

2. The National Funding Formula (NFF)

- 2.1 The NFF assigns funding rates to each of the current formula factors. For some local authorities these are uplifted by an area cost adjustment (ACA). For West Berkshire this is 1.0341 (the same as Wokingham and Reading, with the highest being inner London Boroughs at 1.18172).
- 2.2 In determining the pupil numbers and other pupil characteristics, the October census will continue to be used, but there is no longer a reception uplift applied (where pupils have deferred their place from September to January), and resource unit pupils are now included in the count (though the resource unit place funding is reduced from £10,000 to £6,000).
- 2.3 Table 1 sets out the national rates compared to West Berkshire's current rates.

Table 1: National Funding Formula Rates compared to West Berkshire Current rates

Factor	National Rate 2018/19	WBC National Rate (with ACA added)	Current WBC Rate 2017/18
1.Basic Entitlement:			
Primary	£2,747	£2,841	£2,945
Secondary KS3	£3,863	£3,995	£4,372
Secondary KS4	£4,386	£4,536	£4,372
2.Deprivation:			
Primary current FSM	£440	£455	£0
Primary FSM Ever 6	£540	£558	£875

Primary IDACI Band F (0.2 – 0.25)	£200	£207	£40
Primary IDACI Band E (0.25 – 0.3)	£240	£248	£120
Primary IDACI Band D (0.3 – 0.4)	£360	£372	£240
Primary IDACI Band C (0.4 – 0.5)	£390	£403	£240
Primary IDACI Band B (0.5 – 0.6)	£420	£434	£240
Primary IDACI Band A (over 0.6)	£575	£595	£240
Secondary current FSM	£440	£455	£0
Secondary FSM Ever 6	£785	£812	£670
Secondary IDACI Band F	£290	£300	£60
Secondary IDACI Band E	£390	£403	£180
Secondary IDACI Band D	£515	£533	£360
Secondary IDACI Band C	£560	£579	£360
Secondary IDACI Band B	£600	£620	£360
Secondary IDACI Band A	£810	£838	£360
3.Prior Attainment:			
Primary	£1,050	£1,086	£284
Secondary	£1,550	£1,603	£1,125
4.English as an Additional Language:			
Primary EAL 3	£515	£532	£345
Secondary EAL 3	£1,385	£1,432	£345
5.Sparsity			
Primary	£25,000	£25,852	£0
Secondary	£65,000	£67,216	£100,000
6.Lump Sum:			
Primary	£110,000	£113,747	£122,800
Secondary	£110,000	£113,747	£122,800
7.Rates:			
Primary	17/18		17/18 actual
	estimate		
Secondary	17/18		17/18 actual
	estimate		

- 2.4 Note that the national rates have not been determined by an assessment of 'need' but by the Government's assessment of the fairest weighting of funding between factors according to funding available.
- 2.5 It can be seen that for West Berkshire schools there is a shift in funding from basic entitlement and lump sum funding to additional needs funding. **Annex A** shows for each school a breakdown per formula factor using the NFF rates. The schools that gain funding are generally those with the following characteristics:
 - High number of pupils from deprived backgrounds (particularly those on the IDACI bands).
 - High number of pupils with low prior attainment.
 - Small rural school meeting the sparsity criteria the pupils live more than two miles from their next nearest school.
- 2.6 The following explains why there is this shift for some factors:

- West Berkshire is ranked one of the lowest in terms of deprivation, which was replicated in lower relative funding when the DSG was first put in place – the funding received did not recognise the needs of pupils which this new formula is now addressing.
- When the current West Berkshire formula was set in 2013 it was a School Forum decision that the prior attainment factor for primary schools was not, on its own, a reasonable proxy factor for additional need, and so more funding was added to the AWPU and deprivation.
- It has been a School Forum decision not to use the sparsity factor for primary schools, as most of our small schools fall just outside the criteria and it was felt unfair that just a few would gain and at the expense of the others.
- 2.7 The national formula delivers a minimum increase of 0.5% per pupil in the DSG being allocated to the local authority. For schools that gain, a funding cap of 3% per pupil has been set for 2018/19. These rates increase to 1% and 6% respectively in 2019/20.
- 2.8 There will be a minimum per pupil funding level of £3,300 for primary and £4,600 for secondary (this will go up in 2019/20 to £3,500 for primary and £4,800 for secondary). It is therefore possible to gain more than 3% per pupil, but all West Berkshire schools will be on at least this level without this factor added. Note that this calculation is based on **all** formula funding including the lump sum, it is **not** the basic entitlement.

3. Funding Available to be Allocated to Schools

- 3.1 Funding for schools is allocated to the local authority through the Dedicated Schools Grant (DSG). The grant is split into three funding blocks schools, early years, and high needs. From 2018/19 there will be a fourth block, central school services, which is for the centrally retained services previously funded from the schools block (such as licences, admissions, education welfare). Thus, from 2018/19 the schools block will only be for primary and secondary school formula allocations, plus growth funding for new or growing schools (as such pupils are not included in the funding allocation as they did not exist in the precious October census).
- 3.2 The schools block is not however ring fenced, and up to 0.5% can be transferred to other funding blocks subject to consultation with all schools and Schools' Forum agreement. Secretary of State approval is required for transfers above this limit or where the Schools' Forum has opposed the transfer
- 3.3 The schools block funding for 2018/19 is calculated as follows:
 - The national funding formula at the national rates is run for each school. This is based on October 2016 census data and pupil numbers.
 - An area cost adjustment (ACA) is added to the total sum for each school (1.0341 for West Berkshire).

- Each school is allocated as a minimum a 0.5% per pupil increase against their baseline or a 3% per pupil funding cap against their baseline (the baseline is the 2017/18 formula allocation plus formula funding for the pupil numbers in resource units added back in).
- For primary schools, the minimum per pupil funding level in 2018/19 is set at £3,300, and for secondary £4,600.
- The allocations for every school in the local authority are added up and divided by the October 2016 pupil numbers. This produces a Primary Unit of Funding (£3,875 PUF) and a Secondary Unit of Funding (£4,925 SUF). These funding units are now set for 2018/19.
- In December 2017, the PUF and SUF will be multiplied by the October 2017 primary and secondary pupil numbers to produce the schools block DSG allocation.
- A sum for growth and falling rolls funding is added (equal to the 2017/18 local authority budget plus or minus carry forward from 2016/17), to give the final DSG total.
- 3.4 The local authority in consultation with the Schools' Forum will set aside funding required for the growth fund in 2018/19. The balance is then distributed to schools through the formula, by setting the formula funding rates and a minimum funding guarantee and funding cap on gains.
- 3.5 Overall, West Berkshire gains from the NFF by 1.3% or £1.3m, but the final allocation will be determined by the October 2017 census.
- 3.6 It will be unlikely that a local authority would be able to replicate exactly the national funding formula rates to schools for the following reasons:
 - The funding rates (PUF and SUF) have been determined using October 2016 census data, whereas actual allocations to schools use October 2017 census data. If pupil characteristics (such as deprivation levels) have changed between the two census dates, this will create a surplus or shortfall to be adjusted for.
 - The amount of funding being received for the business rates element of the formula is based on historical amounts, whereas the funding allocated to schools will need to be the actual 2018/19 amounts this is likely to be significantly more.
 - The amount of funding being received for growth and falling rolls funding is based on historical amounts. If the estimated requirement for 2018/19 is greater, this will need to be funded.
 - If there is a significant shortfall in high needs funding, up to 0.5% could be transferred from the schools block allocation.
- 3.7 Based on the October 2016 census data and pupil numbers, the schools block DSG would be £97.5m. Growth funding and increases in business rates would need to be deducted, with the balance available to allocate to schools through

the formula. There is no intention to move funding from this block to any other block:

Balance available to allocate	£97,118,000
Less increase in Business Rates	-£200,000
Less Growth Funding	-£200,000
Schools block DSG	£97,518,000

- 3.8 This figure could go up or down depending on the changes in pupil numbers in the October 2017 census.
- 3.9 The amount of funding required to allocate to schools using the national formula rates could also go up or down, not just in proportion to changes in pupil numbers, but if pupil characteristics used in other formula factors have significantly changed compared to October 2016 (because the funding being received does not recognise this change).
- 3.10 In addition to agreeing on the funding formula, a decision therefore needs to be taken on how to allocate any surplus or shortfall. The final funding will not be known until mid December and after this consultation has taken place.

4. Proposal for 2018/19 Formula and Funding Rates

- 4.1 **Annex B** is an extract from the Government's school revenue funding operations guide, detailing the allowable funding factors for 2018/19. The main changes in the NFF compared to 2017/18 are:
 - Removal of Reception Uplift in the national formula.
 - Use of Free School Meals factor *in addition to* Free School Meals Ever
 6.
 - Removal of Looked After Children factor in the national formula (not used by West Berkshire).
 - A funding floor added into the sparsity factor.
 - Mobility factor only available to those LAs currently using it.
- 4.2 It remains a local authority decision (for at least the next two years) on how the funding is allocated to schools through the formula factors. There is no requirement to stick to the NFF rates, or to use all the factors. However, it is the Government's intention that from 2020/21 all schools will be on the NFF.
- 4.3 Although it may not be possible to replicate exactly the national funding formula as shown in the DfE tables for each school, it is proposed that in principle the aim will be to move as close as possible to the national rates, using all the formula factors, and using the highest minimum funding guarantee possible and applying the 3% per pupil cap on gains. There is no advantage in doing anything different; this gives schools certainty in their funding allocations in future years, the minimum funding guarantee will protect schools that lose, and schools that gain should receive this funding as soon as possible. All Heads Funding Group agreed on this principle.

4.4 This model (using 0% minimum funding guarantee) is shown in **Annex C**. The cost of this model is £96,972k. The impact is as follows:

	Primary	Secondary
No. of schools gaining nil	21	4
Gains £1k to £5k	9	1
Gains £5k to £15k	15	0
Gains £15k to £30k	16	1
Gains over £30k	5	4
Highest Gain	£39,628	£71,313
Average Gain	£10,634	£22,554

- 4.5 The minimum funding guarantee that can be set in the school formula is between 0% to -1.5%; if the local authority wishes to set a minimum funding guarantee of between 0% and +0.5%, an application needs to be made to the Secretary of State for Education, following a consultation with schools and subject to Schools' Forum approval. Heads Funding Group felt that due to current funding shortfalls in all schools, if funding was available, all schools should see an increase in the per pupil funding, no matter how small, and is proposing that this option be pursued.
- 4.6 If there is enough funding to allow a minimum funding guarantee of 0.5%, this is shown in **Annex D**. The cost of this model is £97,127k so could potentially be affordable. The impact is as follows:

	Primary	Secondary
No. of schools gaining nil	0	0
Gains £1k to £5k	29	0
Gains £5k to £15k	16	1
Gains £15k to £30k	16	4
Gains over £30k	5	5
Highest Gain	£39,628	£71.313
Average Gain	£11,495	£32,358

4.7 Heads Funding Group also looked at a model which showed setting funding rates for each formula factor at half way between current rates and NFF rates.

Interestingly, this was the least favourable for schools, showing that the NFF rates do benefit the majority of our schools.

- 4.8 Any surplus or shortfall in funding has to be allocated through the formula factors. Heads Funding Group looked at options for adding additional funding through the basic entitlement, lump sum, or increasing the cap on gains. There was no consensus as in each scenario certain groups of schools gained at the expense of others. The agreed proposal is that the funding rates for all formula factors be scaled upwards or downwards in order to match the final funding allocation. This is because:
 - It is fair and equitable for all schools no particular type of school is advantaged or disadvantaged.
 - It is logical the area cost adjustment is applied to every formula factor, so it makes sense to add or remove funding in the same way.
 - It keeps the funding for all factors in the same proportion to the national funding rates and thus in proportion to the relative needs of pupils in each school.
 - It will make setting of the 2019/20 formula more straightforward, rather than having to address any anomalies that may have arisen, and which could cost more in minimum funding guarantee in future years.
- 4.9 The models assume no change in pupil numbers, and thus illustrate the impact of introducing the NFF. Actual individual school allocations will be dependent on the October 2017 census data. The model using 0% minimum funding guarantee (Annex C) is also available as a spreadsheet, and by entering the school cost centre in the pink box of the "school sheet" tab this will display in detail the formula allocation for the school alongside the current funding received for each factor. Schools can also enter their actual pupil numbers for October 2017 (yellow boxes) to see their likely funding for 2018/19 and beyond based on this model. For 2019/20 this takes into account the increased minimum per pupil funding level and an additional 3% on the cap on gains.
- 4.10 Academies should note that their minimum funding guarantee works in a different way to maintained schools and they will need to apply the funding rates set out in this proposal to their own GAG funding model.
- 1. Do you agree that West Berkshire should move straight to the national funding formula rates for every factor, applying a minimum funding guarantee of 0% and funding cap on gains of 3% (as shown in Table 1 and Annex C)? If not, please let us know with your reasons why.
- 2. Do you agree that if there is additional funding available the minimum funding guarantee should be set between 0% and 0.5% according to affordability i.e. this will mean that every school will receive a minimum increase of up to 0.5% per pupil? If not, please let us know with your reasons why.

3. Do you agree that any shortfall or surplus in funding is addressed by scaling all formula factors downwards or upwards? If not, please let us know with your reasons why.

5. Additional Funding Outside the School Formula

- 5.1 The current funding regulations allow for a few exceptional circumstances to be funded outside the formula and be top sliced from the DSG. For each fund the Schools' Forum need to agree the amount to set aside and clear criteria setting out the circumstances in which a payment could be made and the basis for calculating the sum to be paid. The current criteria for each fund can be accessed via the WBC school funding web page: http://info.westberks.gov.uk/index.aspx?articleid=31483.
- 5.2 The funds are as follows:
 - Growth Fund support for schools required to provide extra places in order to meet basic need within the authority – including the cost of new schools opening.
 - Falling Rolls Fund to support <u>good or outstanding</u> schools with falling rolls where local planning data shows that the surplus places will be needed in the near future
 - Schools with a disproportionate number of high needs pupils which cannot be reflected adequately in their formula funding. This needs to be made through a formula.
- 5.3 As funding for the Growth Fund and Falling Rolls fund is top sliced from the schools block DSG, this impacts on the funding available to allocate out to all schools through the formula.
- 5.4 Bearing this in mind, it is proposed that the Falling rolls Fund is no longer operated. This is because not many other local authorities make use of such a fund and payments are made based on an assumption of future pupil numbers which may or may not materialise. In four years just one school has qualified, yet the pupil numbers for this particular school are now no longer forecast to increase by the number assumed.
- 5.5 There is one minor change proposed to the criteria for the Growth Fund. Under paragraph 2.4, in order to allocate funding for an increase in the Pupil Admission Number, this *must* be in response to basic need in order to comply with the current regulations. In general, growth funding is not payable where a school is expanding due to popularity and there are places available in other nearby schools. It is proposed that the funding set aside for the Growth Fund is based on a realistic assumption of need in 2018/19.
- 5.6 No changes are proposed to the fund for schools with disproportionate number of high needs pupils.

4. If you have any comments/suggestions on this proposal or the criteria set to access the other additional funds please provide details.

5.7 Note that schools may also receive funding from the following sources:
Early year's formula funding for two, three, and four year olds.

- Sixth form funding (national formula).
- High needs place and top up funding.
- Pupil premium grant.
- PE and sports grant.
- Universal infant free school meal grant.

Information on each can be also be accessed via the WBC school funding web page.

6. De-delegations 2018/19 (maintained schools only)

- 6.1 From 2013/14 schools received funding for newly delegated central services. For some services (where offered by the local authority), maintained primary and secondary schools can collectively opt for the service to be de-delegated – which means that the funding is deducted from the formula allocation and continues to be centrally retained for the benefit of all maintained primary and secondary schools, and individual schools cannot make that choice for themselves (Academies may be given the option to buy into the service, as can Nursery schools, Special schools and PRUs). From 2017/18, statutory services previously funded by the Education Services Grant were also added, and the de-delegation for these services relate to all maintained schools. The de-delegations need to be re-determined on an annual basis.
- 6.2 The relevant Schools' Forum representatives for each phase will vote on whether each service is to be de-delegated or not. The services currently de-delegated are as follows:
 - Behaviour Intervention Service
 - Ethnic Minority & Traveller Achievement Service
 - Trade Union Local Representation Service
 - Contingency for Schools in Financial Difficulty (primary schools only)
 - CLEAPSS
 - Statutory & Regulatory Duties (health & safety, internal audit, statutory accounting, pensions administration)
- 6.3 Information about these services were included in a report to the Schools' Forum on 30th October 2017, agenda item 10, which can be viewed on this website:

http://decisionmaking.westberks.gov.uk/ieListMeetings.aspx?Cld=335&Year=0 The amounts to be deducted from each school for 2018/19 will be different to those shown in the report, as they will be based on the October 2017 census data (the current exemplification is based on the October 2016 census).

- 6.4 Note that it is proposed to widen the criteria for primary schools to access the schools in financial difficulty fund. The proposal is for schools not in deficit but required to restructure to avoid going into deficit, to be eligible to apply for funding towards the one off redundancy cost. This will still be subject to the same application and scrutiny process. It is felt by Heads that those who forward plan their restructures and avoid going into deficit are then disadvantaged by not being able to access this fund
- 6.5 The final decision on each de-delegation will be made by the relevant Schools' Forum Members for each phase on 11th December 2017. Schools may wish to

contact their Schools' Forum representative direct to express their view, or respond as part of this consultation.

5. If you do not agree with any of the above services being de-delegated, please let us know with your reasons why.

7. Timetable

7.1 The timetable for determining the school formula and schools budgets for 2018/19 is as follows:

	1
Schools' Forum to review the 2018/19	30 th October 2017
school formula arrangements and agree	
on a proposal.	
Briefing document to schools – with	1 st to 20 th November 2017
opportunity given to make comments on	
the proposals.	
Heads Funding Group to consider the	28 th November 2017
responses from schools and make a	
recommendation to Schools' Forum.	
Apply to Secretary of State to increase	By 30 th November 2017
MFG up to 0.5%	, , , , , , , , , , , , , , , , , , ,
Schools' Forum to agree on the formula	11 th December 2017
and preferred funding rates to	
recommend to the Council. Vote taken on	
de-delegations and the criteria agreed for	
accessing the additional funds.	
October census data issued by the DfE	Mid December
and final DSG funding allocation for	
schools and high needs blocks received.	
Final school formula rates determined	
according to funding available.	
Formal Political approval received.	Executive 18 th January 2018
2018/19 formula submitted to Education	19 th January 2018
& Skills Funding Agency.	-
Schools' Forum to consider the overall	22 nd January 2018
DSG position and remaining budgets for	5
all funding blocks.	
Confirmation of final budget allocations to	By end of January 2018
maintained primary & secondary schools	(statutory deadline 28 th February 2018)
Schools' Forum to decide on the final	12 th March 2018
budget for all DSG funding blocks	
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<u>Annexes</u>

Annex A – West Berkshire Schools - National Funding Formula Compared to Current WBC Formula - Funding per Factor

Annex B – Funding Factors 2018/19 – Extract from ESFA Operational Guide

Annex C – Proposed Formula 2018/19 - Exemplification for Individual Schools

(also provided as separate spreadsheet for schools to see their own formula budget allocation detail and for their own modelling purposes)

Annex D – Formula Using 0.5% Minimum Funding Guarantee (preferred option if funding available)

Annex A

Funding Per Factor: NFF compared to WBC Formula (Prior to MFG & Cap)

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Sign: Strend Puttor of Figuer Phrancy Strend 38 Bit Add Strend Puttor of Figuer Phrancy Strend 302 112/0 903 10 10 100 101/0 903 102/0 100 100 903 102/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0 100/0	95100 Shaw-cum-D	filands Primary School & Nursery Donnington Church of England Primary School	246																		-9,053	0		0 0				25,3
Heims Strangel Mark Bis Add Bi	95200 Shefford Chu	urch of England Primary School	29			-3,029							0	0	0		96,923	3,842			0,000	0	25,852	2 25,852			240,564	20,6 44,4
9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 9700 <th< td=""><td>95400 Springfield P</td><td>Primary School</td><td>301</td><td>886,445</td><td>855,006</td><td>-31,439</td><td>27,075</td><td>28,014</td><td>939</td><td>19,577</td><td>74,845</td><td>55,268</td><td>6,038</td><td>9,319</td><td>3,282</td><td>939,134</td><td>967,184</td><td>28,050</td><td>122,800</td><td>113,747</td><td>-9,053</td><td>0</td><td></td><td>0 0</td><td>17,911</td><td>1,079,845</td><td>1,098,842</td><td>18,9</td></th<>	95400 Springfield P	Primary School	301	886,445	855,006	-31,439	27,075	28,014	939	19,577	74,845	55,268	6,038	9,319	3,282	939,134	967,184	28,050	122,800	113,747	-9,053	0		0 0	17,911	1,079,845	1,098,842	18,9
TTO B. J. John the Samagle Internet & Namey School B11 200 B11 200 B11 200 B11 200 B11 200 B11 200 B1 200	95500 Spurcroft Prin 95700 St Einian's C	imary School Catholic Primary School	433			-45,226															-9,053	0	0	0 0				39,6
Selo S. Nuclei Church d' English Anno Stebul 268 F. Nuclei Church d' English Anno Stebul 268 S. Nuclei Church d' English Anno Stebul 10 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 </td <td>97700 St. John the E</td> <td>Evangelist Infant & Nursery School</td> <td>180</td> <td>530,100</td> <td>511,299</td> <td>-18,801</td> <td>9,159</td> <td>9,483</td> <td>324</td> <td>11,697</td> <td>44,719</td> <td>33,022</td> <td>7,763</td> <td>11,982</td> <td>4,220</td> <td></td> <td></td> <td></td> <td>122,800</td> <td>113,747</td> <td>-9,053</td> <td>0</td> <td>(</td> <td>0 0</td> <td>2,971</td> <td></td> <td>694,201</td> <td>9,7</td>	97700 St. John the E	Evangelist Infant & Nursery School	180	530,100	511,299	-18,801	9,159	9,483	324	11,697	44,719	33,022	7,763	11,982	4,220				122,800	113,747	-9,053	0	(0 0	2,971		694,201	9,7
100 S. Parka Garbing Primary School 223 957.15 923.16 93.448 93.25 27.744 106.200 75.66 6.384 93.255 17.77 40.23 0 0 0 3.448 114.463 192.232 42.850 113.747 40.83 0 0 0 3.448 114.463 192.232 42.850 113.747 40.83 0 0 0 10.77 42.850 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 <td>97800 St. Joseph's 96200 St. Nicolas C</td> <td>Catholic Primary School Church of England Junior School</td> <td>210</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>7,176</td> <td></td> <td>-9,053</td> <td>0</td> <td>0</td> <td>0 0</td> <td></td> <td></td> <td></td> <td>42,0</td>	97800 St. Joseph's 96200 St. Nicolas C	Catholic Primary School Church of England Junior School	210						7,176												-9,053	0	0	0 0				42,0
dedd Strategy Church of England Volkmary Controlled Primary School 291.558 278.374 1-1.191 86.249 7.969 -226 5.969 22.888 16.060 12.20 18.04 64.44 310.885 32.23 12.200 113.747 -0.053 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	96100 St. Pauls Cat	tholic Primary School	325			-33,945			9,332		106,260	78,466		9,855				57,322			-9,053	0	(0 0			1,192,932	48,2
Prior Tabelame Park Charech of England Primary School 328 1133.225 1038.731 40.222 730 Tabelame Park Charech of England Primary School 122.500 113.747 40.55 0 0 0 14.666 1238.731 162.828 4.300 122.500 113.747 40.55 0 0 0 14.666 1238.731 162.828 13.747 40.55 0 0 0 14.646 1238.731 162.828 13.747 40.55 0 0 0 0 13.747 40.55 0 0 0 0 13.747 40.55 0 10.70 44.827 10.76 44.97 10.76 44.97 10.76 44.97 10.76 44.97 10.76 44.97 10.76 44.97 10.80 77.01 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 77.04 <th< td=""><td>96400 Streatley Chu</td><td>urch of England Voluntary Controlled Primary S</td><td>98</td><td>291,555</td><td>278,374</td><td>-13,181</td><td>8,294</td><td>7,969</td><td>-325</td><td>5,995</td><td>22,688</td><td>16,693</td><td></td><td></td><td></td><td>307,064</td><td>310,895</td><td>3,832</td><td>122,800</td><td>113,747</td><td>-9,053</td><td>0</td><td></td><td>0 0</td><td>6,803</td><td>436,667</td><td>431,445</td><td>-5,2</td></th<>	96400 Streatley Chu	urch of England Voluntary Controlled Primary S	98	291,555	278,374	-13,181	8,294	7,969	-325	5,995	22,688	16,693				307,064	310,895	3,832	122,800	113,747	-9,053	0		0 0	6,803	436,667	431,445	-5,2
6600 Thesia Charch of England Phrams School 288 841,002 800,057 -31,582 20,448 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 22,648 12,777 40,528 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 <	96500 Sulhamstead 99700 Thatcham Pa	d and Ufton Nervet Church of England Voluntary ark Church of England Primary School	101										6 401	9.881	3 480						0,000	0	0	0 0				2 46,0
B800 Vestwood Fam Mark School	96600 Theale Churc	ch of England Primary School	285	841,092	809,557	-31,535	29,648	28,057	-1,592	12,609	49,960	37,351				889,675	897,693	8,018	122,800	113,747	-9,053	0	(0 0	14,440	1,026,915	1,025,879	-1,0 16.6
9600 Westwood Fam Jurior School 224 660,656 638,224 -24,272 22,290 28,753 4.64 11,756 4.260 1.622 707,813 107,747 -0,053 0 0 0 0 14,162 840,372 843,177 843,177 107,678 31,374 -0,053 0 0 0 0 14,162 840,372 843,177 14,282 707,718 33,349 114,016 32,026 707,718 33,349 114,016 32,026 707,717 14,604 107,757 14,604 107,757 14,604 107,757 14,604 107,757 14,604 107,757 14,604 107,757 14,604 107,757 14,604 107,757 14,604 107,757 14,604 107,757 107,777 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 10,757 <td></td> <td></td> <td>94</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>6,078</td> <td></td> <td></td> <td></td> <td>3,069</td> <td>4,876</td> <td>0 1,806</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>-9,053</td> <td>0</td> <td>19,259</td> <td>9 19,259 0 0</td> <td></td> <td></td> <td></td> <td>16,6</td>			94						6,078				3,069	4,876	0 1,806						-9,053	0	19,259	9 19,259 0 0				16,6
9700 The Wilewe Permany School 344 1.013.080 977.150 353.080 1140.161 332.13 146.091 107.879 152.262 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 128.202 <td></td> <td></td> <td>224</td> <td></td> <td></td> <td>-24,372</td> <td></td> <td></td> <td>454</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>11,858</td> <td></td> <td></td> <td>-9,053</td> <td>0</td> <td>(</td> <td>0 0</td> <td></td> <td></td> <td>843,177</td> <td>2,8 23,9</td>			224			-24,372			454									11,858			-9,053	0	(0 0			843,177	2,8 23,9
7300 Woohamston Church of England Primary School 92 270,04 281,331 -9,000 3,500 2,889 -9,11 5,173 19,777 14,604 0 0 0 227,613 228,013 228,001 13,747 -9,053 0 0 0 0 0 224,057 0 224,005 238,717 14,045 122,800 113,747 -9,053 0 0 0 0 244,078 238,717 14,055 143,477 -9,053 0 0 0 0 24,805 238,717 14,055 144,045,55 444,457,74 24,805 238,717 14,046 13,747 -9,053 0 0 0 24,805,763 -61,116 12,220 113,747 -9,053 0 0 0 24,805,763 -61,116 12,220 113,747 -9,053 0 0 0 24,805,763 -61,114 64,802,128 113,747 -9,053 0 0 0 0 25,75,74 61,1144 64,228 64,211,148<	98700 The Willows F	Primary School	344	1,013,080	977,150		114,016	130,960		38,213	146,091	107,879	16,715	25,802	9,086	1,182,024	1,280,003	97,979	122,800	113,747	0,000	0		0 0	26,635	1,331,459	1,420,385	88,9
Yale Yale <th< td=""><td></td><td></td><td>405</td><td></td><td></td><td></td><td></td><td></td><td>1,143</td><td></td><td></td><td></td><td>19,699</td><td>31,496</td><td>11,797</td><td></td><td></td><td></td><td></td><td></td><td>-9,053</td><td>0</td><td>(</td><td>0 0</td><td></td><td></td><td></td><td>38.7</td></th<>			405						1,143				19,699	31,496	11,797						-9,053	0	(0 0				38.7
B800 The Downs School 899 3,22,0.56 3,790,473 144,583 57,238 82,0.06 2,80,06 2,80,06 2,80,06 2,80,07 3,22,05 1,16,232 4,050,758 4,105 4,297 3,222 4,116,232 4,050,758 4,116,232 4,050,758 4,116,232 4,050,758 4,116,232 4,050,758 4,116,232 4,050,758 4,116,232 4,050,758 4,116,232 4,050,758 4,116,232 4,050,758 4,116,232 4,050,758 4,212 1,116,232 4,050,758 1,61,640 6,01,154 6,61,154 6,63,154 1,64,164 6,01,154 6,63,154 1,62,808 1,22,800 113,747 -0,053 0 0 0 2,662,756 4,746 1,22,800 113,747 -0,053 0 0 0 1,67,263,756 1,61,463 6,01,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154 6,61,154	97400 Yattendon Ch	hurch of England Primary School	73	214,985	207,360	-7,625	2,859	5,280		6,821	26,077	19,256	0	0	ő	224,665	238,717	14,052	122,800	113,747		Ő	25,85	2 25,852	1,348	348,813	379,663	30,8
9000 John O'Gaurt Community Technology College 338 1.448.892 1.411.300 476.892 2.440 53.244 51.224 118.28 118.28 128.257.48 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043 1.828.043			919 898		3,855,695 3,780,473			248,973 82,086	97,222 24,848		329,843	98,326 56,314		10,025 4,297				40,986			-9,053 -9,053	0	0	0 0				31,9
9200 Utile Heads School 1281 5500.52 5.590.271 200.282 5390.271 200.321 53.446 93.71.23 153.477 228.317 325.284 96.967 7.744 11.475 8.711 6.0425.96 6.100.1747 9.0053 0 0 0 43.869 6.211.646 6.227.490 4.42.845 122.800 113.747 9.0053 0 0 0 43.869 6.211.646 6.227.490 4.42.845 122.800 113.747 9.0053 0 0 0 43.869 6.211.646 6.257.620 6.310.867 1.777 9.055 0 0 0 43.869 6.211.646 6.055.87 5.6 9800 Task School 6.257.406 2.315.88 2.210.201 17.776 5.447.47 6.002.85 11.3747 9.053 0 0 0 142.896 6.109.196 6.42.846 5.799.178 6.247.478 2.2800 113.747 9.053 0 0 0 0 0 0 0 0 <	99000 John O'Gaun	nt Community Technology College	336	1,468,992	1,411,300	-57,692	2,040	53,264	51,224	118,258	168,482	50,225	2,070	8,593	6,523	1,591,360			122,800		-9,053	100,000	59,148	8 -40,852	14,483		1,829,018	29.6
9300 Park House School 793 3.466.96 3.300.687 -157.203 60.564 201.602 287.702 85.79 7.224 3.0114 2.285 3.782,458 3.69.193 11.747 -0.053 0 0 0 8.76 3.920.018 9500 Thead Green School 5.15 8.64 21.022 97.723 12.021 30.206 90.01 13.747 -0.053 0 0 0 14.236 5.15 8.64 12.1021 30.206 90.01 13.747 -0.053 0 0 0 14.236 2.282.75 8.44 12.800 113.747 -0.053 0 0 0 2.382.85 2.278.4573 2.828.758 7.244 3.116 2.2.800 13.747 -0.053 0 0 0 2.382.82 2.828.758 4.82.80 13.747 -0.053 0 0 0 2.382.82 2.2.828.758 4.84.916 2.2.800 13.747 -0.053 0 0 0 2.382.82 2.2.828.72 4.84.91 2.2.800 13.747 -0.053 0 0 0 2.3.828.72			1,391	5,600,532	5,396,271	-245,022 -204,261	213,646	367,123	153,477	228,317	325,284	96,967	2,764	11,475	8,711	6,045,259	6,100,154	54,895	122,800	113,747	-9,053	0	0	0 0	43,589	6,211,648	6,257,490	45,8
9500 These Green School 551 2,414,789 2,330,055 -78,734 101,191 172,164 70,793 120,224 175,799 55,475 1,684 7,174 5,400 2,834,108 53,205 122,800 113,747 -9,055 0 0 0 2,382,55 2,734 2,828,725 4,809,865 9600 The Wink School 862 175,600 155,212 230,015 175,790 55,172 1,716 2,414,78 2,380,85 12,800 113,747 -9,055 0 0 0 0 2,382,5 2,273,4 2,808,96 2,734 2,808,96 2,734 2,808,96 2,804,96 2,841,918 53,025 12,280 113,747 -9,055 0 0 0 0 2,838,26 2,7764 4,809,46 3,788,66 12,809 12,324 2,831,33 53,225 12,280 113,747 -9,055 0 0 0 0 0 0 0 0 0 0 0 0 0 0	99300 Park House S	School	793		3,309,687	-157,309		177,253			287,082	85,579				3,792,458	3,804,137				-9,053	0	(0 0		3,924,019	3,926,644	2,6
9800 The Willink School 862 3.768.664 3.819.370 149.294 82.98 143.909 60.925 130.78 55.512 1.72 7.169 5.442 3.984.082 3.956.684 122.800 13.747 -0.053 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 <th< td=""><td>99500 Theale Green</td><td>n School</td><td>551</td><td>2,414,789</td><td>2,336,055</td><td>-78,734</td><td>101,191</td><td>172,164</td><td>70,973</td><td>120,284</td><td>175,759</td><td>55,475</td><td>1,684</td><td>7,174</td><td>5,490</td><td>2,637,948</td><td>2,691,153</td><td></td><td>122,800</td><td>113,747</td><td>-9,053</td><td>0</td><td></td><td>0 0</td><td>23,825</td><td>2,784,573</td><td>2,828,725</td><td>44,1</td></th<>	99500 Theale Green	n School	551	2,414,789	2,336,055	-78,734	101,191	172,164	70,973	120,284	175,759	55,475	1,684	7,174	5,490	2,637,948	2,691,153		122,800	113,747	-9,053	0		0 0	23,825	2,784,573	2,828,725	44,1
PRIMARY TOTAL 13,261 39,196,533 37,686,566 -1,467,967 1,68,040 1,768,542 74,938 976,443 3,738,913 2,762,450 248,763 33,625,16 1,506,753 43,625,16 1,506,753 43,642,516 50,7524 0 99,161 99,161 828,886 50,989,449 51,987,838 1,00,00 59,148 40,852 444,407 44,845,659 44,711,779 6 TOTAL ALL SCHOOLS 22,335 76,846,427 7,792,487 3,064,455 2,350,996 6,586,458 3,63,642 256,571 545,191 256,528 84,828,015 86,83,073 1,704,658 9,332,000 5,914 40,852 444,407 44,845,6559 44,711,779 6 TOTAL ALL SCHOOLS 22,335 76,844,842 7,592,487 3,662,510 1,506,733 1,704,658 9,332,000 5,644,742 -488,055 100,000 59,148 40,852 444,407 44,845,6559 44,711,779 6 100,100 156,309 5,64,432 2,550,986 5,656,488 3,652,516 156,5	99900 Trinity Schoo 99600 The Willink S	ol & Performing Arts College School	779		3,252,146 3,619,370	-175,600												80,366			-9,053 -9,053	0	0	0 0				71,3 -36,4
SECONDARY TOTAL 9,074 39,710,409 38,723,921 -1,586,488 1,150,501 1,939,995 789,493 1,974,534 2,847,545 873,012 37,608 159,096 121,288 42,873,252 43,070,557 197,305 1,228,000 1,137,466 -90,534 100,000 59,148 -40,852 444,407 44,645,659 44,711,579 6 TOTAL ALL SCHOOLS 22,335 76,846,842 75,792,487 -3,054,455 2,844,505 3,706,937 864,452 2,350,996 6,586,458 3,635,462 265,571 545,191 255,620 84,929,015 86,633,073 1,704,658 9,332,000 8,644,742 -688,056 100,000 155,309 56,309 1,273,293 95,635,108 96,709,417 1,079	PRIMARY	OTAL	13,261	39,136,533	37,668,566	-1,467,967	1,694,004	1,768,942	74,938	976,463	3,738,913	2,762,450	248,763		137,331	42,055,763	43,562,516	1,506,753	8,104,800		-597,524	0	99.16	1 99,161	828,886	50,989,449		1,008,3
			9,074	39,710,409	38,123,921	-1,586,488	1,150,501	1,939,995	789,493	1,974,534	2,847,545	873,012	37,808	159,096	121,288	42,873,252	43,070,557	197,305	1,228,000	1,137,466	-90,534		59,14	8 -40,852	444,407	44,645,659	44,711,579	65,93
reource unt adjustment added	TOTAL ALL	SCHOOLS	22,335	/8,846,942	/5,792,487	-3,054,455	2,844,505	3,708,937	864,432	2,950,996	6,586,458	3,635,462	286,571	545,191	258,620	84,929,015	86,633,073	1,704,058	9,332,800	8,644,742	-688,058	100,000	158,309	58,309	1,273,293	95,635,108	96,709,417	1,074,30
				reource unit adj	ustment adde	d																						

Annex B

Funding Factors 2018/19 – Extract from ESFA Operational Guide

Funding Factors 2018/19 – Extr	act from ESFA Operational Guide
Funding Factor	Description and further information
1. Basic entitlement A compulsory factor	This factor assigns funding on the basis of individual pupils, with the number of pupils for each school or academy based on the October pupil census. [funding is allocated according to an age-weighted pupil unit (AWPU) [there is a single rate for primary age pupils, which must be at least £2,000 [there can be different rates for KS3 and KS4, with a minimum of £3,000 for each [local authorities can choose to increase the pupil number count for schools with higher reception pupil numbers in January 2017 than the October 2016 census we'll not include reception uplift in the national funding formula; local authorities currently using a reception uplift factor should consider whether to do so in 2018 to 2019 schools with reception uplift will not be financially disadvantaged in the national funding formula calculations, as the funding will remain in their baselines
2. Deprivation A compulsory factor	Local authorities can use free school meals (FSM), the income deprivation affecting children index (IDACI), or both to calculate the deprivation factor. We measure eligibility for current FSM using the previous October census, and Ever6 FSM (pupils entitled to free meals at any time in the last 6 years) from the previous January census local authorities using FSM to calculate deprivation can choose to use either current FSM, Ever6 FSM, or both the IDACI measure uses 6 bands, and different values can be attached to each band; different unit values can be used for primary and secondary within each band we'll automatically set the FSM Ever6 ratio equal to the current FSM ratio for schools where the FSM Ever6 rate is recorded as lower than the current FSM rate
3. Prior attainment An optional factor (used by most local authorities)	The prior attainment factor acts as a proxy indicator for low level, high incidence, special educational needs. we'll confirm a separate weighting for new year 7 pupils later in the year

	We've included more information in the prior attainment section of this guidance
4. Looked-after children (LAC) An optional factor	Local authorities can apply a single unit value for any child who has been looked after for one day or more, as recorded on the LA SSDA903 return at 31 March 2017. we map this data to schools using the January school census, to identify the number of LAC in each school or academy we've increased the pupil premium plus rates for 2018 to 2019 from £1900 to £2300 we've not used a LAC factor in the national funding formula; local authorities currently using this factor should consider whether to do so in 2018 to 2019
5. English as an additional language (EAL) An optional factor	 Pupils identified in the October census with a first language other than English may attract funding for up to three years after they enter the statutory school system. □ local authorities can choose to use indicators based on one, two, or three years, and there can be separate unit values for primary and secondary
6. Pupil mobility An optional factor	This measure counts pupils who entered a school during the last three academic years, but did not start in August or September (or January for reception pupils). □ there is a 10% threshold, and funding is allocated based on the proportion above the threshold (for example, a school with 12% mobility, will attract pupil mobility funding for 2% of pupils)
7. Sparsity An optional factor	Schools that are eligible for sparsity funding must meet two criteria: they are located in areas where pupils would have to travel a significant distance to an alternative should the school close they are small schools
8. Lump sum An optional factor (used by all local authorities)	 We've included more information in the sparsity section of this guidance. Local authorities can set a flat lump sum for all phases, or differentiate the sums for primary and secondary. local authorities should give middle schools a weighted average, based on the number of year groups in each phase the maximum lump sum is £175,000, even for schools that receive London fringe uplift

sur	e've included more information in the lump in section of this guidance, including prmation for amalgamated schools.
An optional factor sch beg sep a crit how We	e purpose of this factor is to support nools that have unavoidable extra costs cause the school buildings are on parate sites. allocations must be based on objective eria for the definition of a split site, and for w much is paid e've included more information in the split es section of this guidance
10. Rates Loc An optional factor (used by all local authorities) est authorities) rate be f be f <td< td=""><td>cal authorities must fund rates at their imate of the actual cost. ocal authorities can make adjustments to es during the financial year, but this must done outside of the funding formula for example, an additional allocation could made to a school (funded by balances ought forward) his should be reflected in the Section 251 turn statement, and in each school's counts he effect on the school would be zero, ce any rates adjustment will be offset by a ange in the cost of the rates</td></td<>	cal authorities must fund rates at their imate of the actual cost. ocal authorities can make adjustments to es during the financial year, but this must done outside of the funding formula for example, an additional allocation could made to a school (funded by balances ought forward) his should be reflected in the Section 251 turn statement, and in each school's counts he effect on the school would be zero, ce any rates adjustment will be offset by a ange in the cost of the rates
contracts sch An optional factor pressed Sch PF bad Weiler	e purpose of this factor is to support nools that have unavoidable extra emises costs (because they are a PFI nool), and to cover situations where the I 'affordability gap' is delegated and paid ck to the local authority. e've included more information in the PFI ction of this guidance.
12. London fringe The An optional factor, applicable only for five sch local authorities (Buckinghamshire, Essex, sal Hertfordshire, Kent, and West Sussex) frin aut - 1.0 su bit - frin - frin - bit - frin - <td>e purpose of this factor is to support nools that have to pay higher teacher aries because they are in the London ge area, and only part of the local chority is in this area. This factor is applied as a multiplier of 156 to the 6 pupil-led factors, the lump m factor, and the sparsity factor e've provided details of these calculations he technical specification for the schools ck dataset.</td>	e purpose of this factor is to support nools that have to pay higher teacher aries because they are in the London ge area, and only part of the local chority is in this area. This factor is applied as a multiplier of 156 to the 6 pupil-led factors, the lump m factor, and the sparsity factor e've provided details of these calculations he technical specification for the schools ck dataset.
13. Exceptional premises factors	cal authorities can apply to ESFA to use

	 premises (for example, for rents, or joint-use sports facilities). exceptional factors must relate to premises costs local authorities should only submit applications where the value of the factor is more than 1% of a school's budget, and applies to fewer than 5% of the schools in the authority's area local authorities can use exceptional premises factors used in 2017 to 2018 (for pre-existing, and newly-qualifying schools) in 2018 to 2019, if the qualification criteria are still met
14. Minimum level of per pupil funding for secondary schools An optional factor	The purpose of this factor is to allow local authorities to provide amounts up to the minimum per pupil funding levels for primary and secondary schools. □ The formula will provide local authorities with per-pupil funding of at least £3,500 for primary schools and £4,800 for secondary schools with pupils in years 10 and 11 in 2019 to 2020 □ The formula will provide a transitional minimum amount of per pupil funding of at least £3,300 for primary schools and £4,800 in 2019, as a step towards the £3,500 and £4,800 in 2019 to 2020. □ Where local authorities choose to use this factor, any capping and scaling cannot take the school below the minimum value set in the local formula □ Local authorities should calculate the minimum per pupil level on the basis of the school's total funding. This will be set out in the APT guidance. Local authorities who wish to reflect the NFF calculation by excluding premises factors that have been excluded from the NFF calculation should submit a disapplication request to agree this change.
	We've included more information on the setting a minimum per pupil amount for schools section of this guidance.
Local authorities must allocate at least 80%	liocated through pupil-led factors of the delegated schools block funding through and 14 above, and London fringe uplift, where

relevant).

Annex C

Proposed Formula Exemplification 2018/19 At 0% MFG

		2017/18 ACTUAL ALLOCATION (including MFG) Formula				2018/19 EXEMPLIFICATION (prior to MFG)			Change	MFG/CAP on GAINS			Total Funding	Overall Change		
Cost Centre	SCHOOL	Formula Budget	add adjustments	Pupil No's (Oct 2016)	Per Pupil Funding	Formula Budget	Pupil No's (Oct 2016)	Per Pupil Funding	Prior to Transition Adjs	MFG 0.00%	CAP 3%	TOTAL	2018/19	Transition Funding	%	Pupil No's
	Aldermaston Church of England Primary School	729,665	729,665	185	3,944.14	738,294	185	3,990.78	8,629	0	0	0	738,294	8,629	1.2%	0
91100 91300	Basildon Church of England Primary School Beedon Church of England Controlled Primary School	574,121 283,256	574,121 283,256	143 46	4,014.83 6,157.75	591,095 270,824	143 46	4,133.53 5,887.48	16,974 -12,432	0 12,432	-3,575 0	-3,575 12,432	587,520 283,256	13,399 0	2.3% 0.0%	0
91400	Beenham Primary School	395,997	395,997	82	4,829.23	395,037	82	4,817.53	-959	959	0	959	395,997	0	0.0%	0
91200 91500	Birch Copse Primary School Bradfield Church of England Primary School	1,449,809 573,436	1,449,809 573,436	424 142	3,419.36 4,038.28	1,464,757 573,092	424 142	3,454.62 4,035.86	14,948 -344	0 344	0	0	1,464,757 573,436	14,948	1.0%	0
91600	Brightwalton Church of England Aided Primary School	429,227	429,227	100	4,292.27	426,519		4,265.19	-2,708	2,708	0	2,708	429,227	0	0.0%	0
91700 91800	Brimpton Church of England Primary School	300,320	300,320 530,934	50 129	6,006.39	281,253 539,416	50 129	5,625.06 4,181.52	-19,067 8,482	19,067 0	0	19,067	300,320 539,416	0 8,482	0.0%	0
91900	Bucklebury Church of England Primary School Burghfield St. Mary's Church of England Primary School	530,934 775,875	775,875	206	4,115.77 3,766.38	767,337	206	3,724.94	-8,538	8,538	0	8,538	775,875	0,402	0.0%	0
92000	Calcot Infant School & Nursery	914,479	914,479	230	3,976.00	902,502	230	3,923.92	-11,977	11,977	0	11,977	914,479	0	0.0%	0
92100 95600	Calcot Junior School Chaddleworth St. Andrew's Church of England Primary Sch	1,098,192 227,955	1,098,192 227,955	279 29	3,936.17 7,860.53	1,166,478 222,891	279 29	4,180.92 7,685.89	68,286 -5,065	0 5,065	-39,449 0	-39,449 5,065	1,127,028 227,955	28,836 0	2.6% 0.0%	0
92400	Chieveley Primary School	782,595	782,595	209	3,744.48	782,615	209	3,744.57	19	0	0	0	782,615	19	0.0%	0
95900 92200	Cold Ash St. Mark's Church of England Primary School Compton Church of England Primary School	732,690 709,864	732,690 709,864	197 185	3,719.24 3,837.10	728,805 715,144	197 185	3,699.52 3,865.64	-3,886 5,279	3,886	0		732,690 715,144	0 5,279	0.0%	0
92300	Curridge Primary School	442,540	442,540	103	4,296.51	433,598	103	4,209.69	-8,943	8,943	0		442,540	0	0.0%	0
92500	Downsway Primary School	787,208	787,208	209	3,766.54	800,120	209	3,828.33	12,912	0	0	0	800,120	12,912	1.6%	0
92800 92900	Enborne Church of England Primary School Englefield Church of England Primary School	331,691 425,512	331,691 425,512	65 98	5,102.94 4,341.96	335,864 417,157	65 98	5,167.13 4,256.71	4,172 -8,354	0 8,354	0	0 8,354	335,864 425,512	4,172 0	1.3% 0.0%	0
93000	Falkland Primary School	1,508,264	1,508,264	450	3,351.70	1,523,207	450	3,384.90	14,944	0	0	0	1,523,207	14,944	1.0%	0
93100 93200	Fir Tree Primary School & Nursery Francis Baily Primary School	804,033 1,876,252	804,033 1,876,252	191 541	4,209.60 3,468.12	808,091 1,896,002	191 541	4,230.84 3,504.63	4,057 19,750	0	0	0	808,091 1,896,002	4,057 19,750	0.5%	0
93400	Garland Junior School	837,818	837,818	217	3,860.91	856,534	217	3,947.16	18,715	0	0	0	856,534	18,715	2.2%	0
93500	Hampstead Norreys Church of England Primary School	404,801	404,801	88	4,600.01	400,731	88	4,553.77	-4,069	4,069	0	4,069	404,801	0	0.0%	0
93600 93700	Hermitage Primary School Hungerford Primary School	748,123 1,410,500	748,123 1,410,500	193 392	3,876.29 3,598.22	749,335	193 392	3,882.57 3,690.75	1,212 36,273	0	0	0	749,335	1,212 36,273	0.2%	0
92700	The Isleys' Primary School	302,308	302,308	57	5,303.66	315,419	57	5,533.66	13,110	0	-8,330	-8,330	307,089	4,780	1.6%	0
93800	Inkpen Primary School	363,081	363,081	76	4,777.38	361,544	76	4,757.15	-1,537	1,537	12 090	1,537 -13,989	363,081	0	0.0%	0
93900 94000	John Rankin Infant & Nursery School John Rankin Junior School	959,362 1,025,077	959,362 1,025,077	260 280	3,689.86 3,660.99	998,251 1,055,117	260 280	3,839.43 3,768.28	38,889 30,041	0	-13,989 -3,298	-13,969	984,262 1,051,820	24,899 26,743	2.6% 2.6%	0
94100	Kennet Valley Primary School	779,143	779,143	194	4,016.20	802,261	194	4,135.37	23,118	0	-3,577	-3,577	798,684	19,541	2.5%	0
94200 94300	Kintbury St. Mary's Church of England Primary School Lambourn Church of England Primary School	590,929 793,951	590,929 793,951	140 196	4,220.92 4,050.77	566,761 839,905	140 196	4,048.29 4,285.23	-24,168 45,955	24,168 0	0 -26,365	24,168 -26,365	590,929 813,541	0 19,590	0.0%	0
94400	Long Lane Primary School	778,698	778,698	208	3,743.74	779,275	208	3,746.52	577	0	0	0	779,275	577	0.1%	0
95800	Mortimer St. Johns Church of England Infant School	692,545	692,545	181	3,826.22	687,276	181	3,797.11	-5,269	5,269	0	5,269	692,545	0	0.0%	0
97500 94500	Mortimer St. Mary's Church of England Junior School Mrs. Bland's Infant & Nursery School	802,498 683,198	802,498 683,198	216 169	3,715.27 4,042.59	807,546 702,255	216 169	3,738.64 4,155.35	5,048 19,057	0	0 -2,323	-2,323	807,546 699,932	5,048 16,734	0.6%	0
94600	Pangbourne Primary School	785,442	785,442	205	3,831.43	794,773	205	3,876.94	9,331	0	0	0	794,773	9,331	1.2%	0
94700 94800	Parsons Down Infant School Parsons Down Junior School	818,920 1,128,047	818,920 1,128,047	217 308	3,773.83 3,662.49	835,964 1,158,379	217 308	3,852.37 3,760.97	17,044 30,332	0	0 -651	0 -651	835,964 1,157,728	17,044 29,681	2.1% 2.6%	0
94900	Purley Church of England Primary School	486,276	486,276	112	4,341.75	491,599	112	4,389.28	5,324	0	0	0	491,599	5,324	1.1%	0
95000	Robert Sandilands Primary School & Nursery	957,081	957,081	246	3,890.57	982,457	246	3,993.73	25,376	0	-563	-563	981,893	24,813	2.6%	0
95100 95200	Shaw-cum-Donnington Church of England Primary School Shefford Church of England Primary School	471,877 237,283	471,877 237,283	94 29	5,019.96 8,182.16	429,635 240,564	94 29	4,570.59 8,295.31	-42,241 3,281	42,241 0	0 -472	42,241 -472	471,877 240,092	0 2,809	0.0%	0
95300	Speenhamland Primary School	1,062,242	1,095,560	291	3,764.81	1,140,032	291	3,917.63	44,471	0	-15,113	-15,113	1,124,919	29,359	2.7%	0
95400 95500	Springfield Primary School Spurcroft Primary School	1,079,845 1,556,195	1,079,845 1,556,195	301 433	3,587.53 3,593.98	1,098,842 1,595,824	301 433	3,650.64 3,685.51	18,997 39,628	0	0	0	1,098,842 1,595,824	18,997 39,628	1.8% 2.5%	0
	St. Finian's Catholic Primary School	736,784	736,784	197	3,740.02	762,712		3,871.63	25,927	0	-7,297	-7,297	755,414	18,630	2.5%	0
97700	St. John the Evangelist Infant & Nursery School	684,718	684,718	180	3,803.99	694,201	180	3,856.67	9,483	0	0	0	694,201	9,483	1.4%	0
97800 96200	St. Joseph's Catholic Primary School St. Nicolas Church of England Junior School	804,463 940,120	804,463 940,120	210 258	3,830.78 3,643.88	846,544 951,106	210 258	4,031.16 3,686.46	42,081 10,985	0	-21,456 0	-21,456 0	825,089 951,106	20,626 10,985	2.6% 1.2%	0
	St. Pauls Catholic Primary School	1,144,663	1,144,663	325	3,522.04	1,192,932	325	3,670.56	48,269	0	-17,445	-17,445	1,175,487	30,824	2.7%	0
	Stockcross Church of England Primary School Streatley Church of England Voluntary Controlled Primary S	428,993 436,667	428,993 436,667	101 98	4,247.46 4,455.78	424,220 431,445	101 98	4,200.20 4,402.50	-4,774 -5,222	4,774 5,222	0	4,774 5,222	428,993 436,667	0	0.0%	0
96500	Sulhamstead and Ufton Nervet Church of England Voluntar	434,635	434,635	101	4,303.32	434,835	101	4,305.30	200	0	0	0,222	434,835	200	0.0%	0
	Thatcham Park Church of England Primary School Theale Church of England Primary School	1,383,731 995,698	1,383,731 1,026,915	385 285	3,594.11 3,603.21	1,429,826 1,025,879		3,713.83 3,599.58	46,096 -1,036	0	-8,446 0	-8,446 1,036	1,421,380 1,026,915	37,650 0	2.7% 0.0%	0
96700	Welford and Wickham Church of England Primary School	420,488		94	4,473.27	434,884		4,626.43	14,397	1,030	-5,951	-5,951	428,933	8,445	2.0%	0
	Westwood Farm Infant School	677,419		177	3,916.49	701,939		3,965.75	8,720	0	0		701,939	8,720	1.3%	0
96900 97000	Westwood Farm Junior School Whitelands Park Primary School	824,671 1,165,957	840,372 1,165,957	224 316	3,751.66 3,689.74	843,177 1,189,943	224 316	3,764.18 3,765.64	2,805 23,986	0	0	0	843,177 1,189,943	2,805 23,986	0.3%	0
98700	The Willows Primary School	1,353,646	1,353,646	344	3,935.02	1,420,385	344	4,129.03	66,739	0	-30,341	-30,341	1,390,044	36,398	2.7%	0
99400 97300	The Winchcombe School Woolhampton Church of England Primary School	1,574,421 411,519		405 92	4,022.24 4,473.03	1,518,147 398,848	405 92	3,748.51 4,335.31	-110,861 -12,671	110,861 12,671	0	110,861 12,671	1,629,008 411,519	0	0.0%	0
97300	Yattendon Church of England Primary School	359,866	359,866	92 73	4,929.67	379,663	73	5,200.86	19,797	0	-13,229	-13,229	366,433	6,568	1.8%	0
98900	Denefield School	4,561,016	4,561,016	919	4,963.02	4,592,948	919	4,997.77	31,932	0	0	0	4,592,948	31,932	0.7%	0
98800 99000	The Downs School John O'Gaunt Community Technology College	4,265,350 1,859,398		898 336	4,749.83 5,533.92	4,195,136 1,829,018		4,671.64 5,443.51	-70,213 -30,380	70,213 30,380	0		4,265,350 1,859,398	0	0.0%	0
99100	Kennet School	6,617,820	6,755,714	1,391	4,856.73	6,785,395	1,391	4,878.07	29,681	0	0	0	6,785,395	29,681	0.4%	0
	Little Heath School Park House School	6,211,648 3,924,019		1,281 793	4,849.06 4,948.32	6,257,490 3,926,644	1,281 793	4,884.85 4,951.63	45,842 2,625	0	0	0	6,257,490 3,926,644	45,842 2,625	0.7% 0.1%	0
	St. Bartholomew's School	6,109,196		1,264	4,948.32 4,833.22	6,055,878		4,951.03	-53,318	53,318	0		6,109,196	2,025	0.1%	0
99500	Theale Green School	2,717,548	2,784,573	551	5,053.67	2,828,725	551	5,133.80	44,151	0	0	0	2,828,725	44,151	1.6%	0
99900 99600	Trinity School & Performing Arts College The Willink School	3,805,268 4,207,766		779 862	5,131.88 4,881.40	4,069,046 4,171,298		5,223.42 4,839.09	71,313 -36,468	0 36,468	0		4,069,046 4,207,766	71,313 0	1.8% 0.0%	0
33000		7,207,700	7,201,100	002	+,001.40	+,1/1,298	002	-,059.09	-30,400	30,400			+,207,700	0	0.0%	0
	PRIMARY TOTAL		51,368,240	13,261	3,862	51,997,838	13,261	3,921	629,598	294,119	-221,871	72,248	52,070,086	701,847		0
	SECONDARY TOTAL TOTAL ALL SCHOOLS		44,676,414 96,044,654	9,074 22,335	4,880	44,711,579 96,709,417		4,927	35,164 664,762	190,379 484,498	0 -221,871	190,379 262,627	44,901,958 96,972,044	225,543 927,390		0

Annex D

Proposed Formula Exemplification 2018/19 At 0.5% MFG

91100 Ba 91300 Be 91400 Be 91200 Bir 91500 Br 91600 Br 91700 Br 91800 Bu 91900 Bu 92000 Ca 92100 Ca	SCHOOL dermasion Church of England Primary School isidon Church of England Primary School isidon Church of England Controlled Primary School erham Primary School adfield Church of England Primary School ightwation Church of England Primary School impton School St. Marys Church of England Primary School icot Infant School & Nursery icot Jurior School	Formula Budget 729,665 574,121 283,256 395,997 1,449,809 573,436 429,227 300,320 530,324	Formula add adjustments 729,665 574,121 283,256 395,997 1,449,809 573,436 429,227	Pupil No's (Oct 2016) 185 143 46 82	Per Pupil Funding 3,944.14 4,014.83	Formula Budget	Pupil No's (Oct 2016)	Per Pupil Funding	Prior to Transition Adjs	MFG 0.00%	CAP 3%	TOTAL	2018/19	Including Transition		Pupil
91100 Ba 91300 Be 91400 Be 91200 Bir 91500 Br 91600 Br 91700 Br 91800 Bu 91900 Bu 92000 Ca 92100 Ca	sildon Church of England Primary School eedon Church of England Controlled Primary School erham Primary School adfield Church of England Primary School gifwalano Church of England Aided Primary School impton Church of England Primary School kklebury Church of England Primary School rghfield St. Marys Church of England Primary School rghfield St. Marys Church of England Primary School rghfield St. Marys Church of England Primary School	574,121 283,256 395,997 1,449,809 573,436 429,227 300,320	574,121 283,256 395,997 1,449,809 573,436	143 46						0.00%	3%			Funding		No's
91300 Be 91400 Be 91200 Bir 91500 Br 91500 Br 91600 Br 91700 Br 91800 Bu 91900 Bu 92000 Ca 92100 Ca	edon Church of England Controlled Primary School erenham Primary School rch Copse Primary School adfield Church of England Primary School ightwatton Church of England Aided Primary School impton Church of England Primary School cklebury Church of England Primary School grifield St. Mary's Church of England Primary School alcot Infant School & Nursery	283,256 395,997 1,449,809 573,436 429,227 300,320	283,256 395,997 1,449,809 573,436	46	4,014.83	738,294	185	3,990.78	8,629	0	0	0	738,294	8,629	1.2%	0
91400 Be 91200 Bir 91500 Bra 91600 Bri 91700 Bri 91800 Bu 91900 Bu 92000 Ca 92100 Ca	enham Primary School ch Copse Primary School adfield Church of England Primary School gitwalton Church of England Aided Primary School impton Church of England Primary School cklebury Church of England Primary School grifield St. Marys Church of England Primary School istot Infant School & Nursery	395,997 1,449,809 573,436 429,227 300,320	395,997 1,449,809 573,436		6,157.75	591,095 270,824	143 46	4,133.53 5,887.48	16,974 -12,432	0 13,269	-3,575 0	-3,575 13,269	587,520 284,093	13,399 836	2.3% 0.3%	0
91500 Bra 91600 Bri 91700 Bri 91800 Bui 91900 Bui 92000 Ca 92100 Ca	adfield Church of England Primary School ghtwellon Church of England Aided Primary School implon Church of England Primary School kelbeury Church of England Primary School grigffield SL Mary's Church of England Primary School sloot Infant School & Nursery	573,436 429,227 300,320	573,436		4,829.23	395,037	82	4,817.53	-959	2,311	0	2,311	397,348	1,352	0.3%	0
91600 Bri 91700 Bri 91800 Bui 91900 Bui 92000 Ca 92100 Ca	ightwalton Church of England Aided Primary School Impton Church of England Primary School Icklebury Church of England Primary School griffield SL Mary's Church of England Primary School Ictot Infant School & Nursery	429,227 300,320		424 142	3,419.36 4,038.28	1,464,757 573,092	424 142	3,454.62 4,035.86	14,948 -344	0 2,634	0	2,634	1,464,757 575,726	14,948 2,290	1.0%	0
91800 Bu 91900 Bu 92000 Ca 92100 Ca	icklebury Church of England Primary School Irghfield St. Mary's Church of England Primary School Ilcot Infant School & Nursery		-123,221	142	4,030.20	426,519		4,055.80	-2,708	4,276	0	4,276	430,795	1,568	0.4%	0
91900 Bu 92000 Ca 92100 Ca	rghfield St. Mary's Church of England Primary School alcot Infant School & Nursery	530,934	300,320	50	6,006.39	281,253	50	5,625.06	-19,067	19,986	0	19,986	301,239	919	0.3%	0
92000 Ca 92100 Ca	alcot Infant School & Nursery	775,875	530,934 775,875	129 206	4,115.77 3,766.38	539,416 767,337	129 206	4,181.52 3,724.94	8,482 -8,538	0 11,776	0	11,776	539,416 779,113	8,482 3,238	1.6% 0.4%	0
	alcot Junior School	914,479	914,479	230	3,976.00	902,502	230	3,923.92	-11,977	15,900	0	15,900	918,402	3,923	0.4%	0
	addleworth St. Andrew's Church of England Primary Sch	1,098,192 227,955	1,098,192 227,955	279 29	3,936.17 7,860.53	1,166,478 222,891	279 29	4,180.92 7,685.89	68,286 -5,065	0 5,622	-39,449 0	-39,449 5,622	1,127,028 228,512	28,836 557	2.6% 0.2%	0
	nieveley Primary School	782,595	782,595	209	3,744.48	782,615	209	3,744.57	19	3,189	0	3,189	785,803	3,208	0.4%	0
	old Ash St. Mark's Church of England Primary School	732,690	732,690	197 185	3,719.24	728,805 715,144	197 185	3,699.52 3,865.64	-3,886	6,911 0	0	6,911	735,716	3,025	0.4%	0
	ompton Church of England Primary School Irridge Primary School	709,864 442,540	709,864 442,540	103	3,837.10 4,296.51	433,598	103	4,209.69	5,279 -8,943	10,556	0	10,556	715,144 444,153	5,279 1,613	0.7%	0
92500 Do	ownsway Primary School	787,208	787,208	209	3,766.54	800,120	209	3,828.33	12,912	0	0	0	800,120	12,912	1.6%	0
	borne Church of England Primary School glefield Church of England Primary School	331,691 425,512	331,691 425,512	65 98	5,102.94 4,341.96	335,864 417,157	65 98	5,167.13 4,256.71	4,172 -8,354	0 9,905	0	0 9,905	335,864 427,062	4,172 1,550	1.3%	0
93000 Fa	Ikland Primary School	1,508,264	1,508,264	450	3,351.70	1,523,207	450	3,384.90	14,944	0	0	0	1,523,207	14,944	1.0%	0
	Tree Primary School & Nursery ancis Baily Primary School	804,033 1,876,252	804,033 1,876,252	191 541	4,209.60 3,468.12	808,091 1,896,002	191 541	4,230.84 3,504.63	4,057 19,750	0	0	0	808,091 1,896,002	4,057 19,750	0.5%	0
	arland Junior School	837,818	837,818	217	3,860.91	856,534	217	3,947.16	18,715	0	0	0	856,534	18,715	2.2%	0
	Impstead Norreys Church of England Primary School	404,801	404,801	88	4,600.01	400,731	88	4,553.77	-4,069	5,467	0	5,467	406,198	1,398	0.3%	0
	rmitage Primary School Ingerford Primary School	748,123	748,123	193 392	3,876.29 3,598.22	749,335	193 392	3,882.57 3,690.75	1,212 36,273	1,858 0	0	1,858 0	751,193 1,446,774	3,070 36,273	0.4% 2.6%	0
92700 The	e Isleys' Primary School	302,308	302,308	57	5,303.66	315,419	57	5,533.66	13,110	0	-8,330	-8,330	307,089	4,780	1.6%	0
	pen Primary School hn Rankin Infant & Nursery School	363,081 959,362	363,081 959,362	76 260	4,777.38 3,689.86	361,544 998,251	76 260	4,757.15 3,839.43	-1,537 38,889	2,770 0	0 -13,989	2,770	364,314 984,262	1,233 24,899	0.3%	0
	hn Rankin Junior School	1,025,077	1,025,077	280	3,660.99	1,055,117	280	3,768.28	30,003	0	-3,298	-3,298	1,051,820	26,743	2.6%	0
	ennet Valley Primary School	779,143	779,143	194	4,016.20	802,261	194	4,135.37	23,118	0	-3,577	-3,577	798,684	19,541	2.5%	0
	ntbury St. Mary's Church of England Primary School mbourn Church of England Primary School	590,929 793,951	590,929 793,951	140 196	4,220.92 4,050.77	566,761 839,905	140 196	4,048.29 4,285.23	-24,168 45,955	26,483 0	0 -26,365	26,483 -26,365	593,243 813,541	2,314 19,590	0.4%	0
94400 Loi	ng Lane Primary School	778,698	778,698	208	3,743.74	779,275	208	3,746.52	577	2,670	0	2,670	781,945	3,247	0.4%	0
	ortimer St. Johns Church of England Infant School ortimer St. Mary's Church of England Junior School	692,545 802,498	692,545 802,498	181 216	3,826.22 3,715.27	687,276 807,546	181 216	3,797.11 3,738.64	-5,269 5,048	8,113 0	0	8,113	695,389 807,546	2,844 5,048	0.4%	0
	s. Bland's Infant & Nursery School	683,198	683,198	169	4,042.59	702,255		4,155.35	19,057	0	-2,323	-2,323	699,932	16,734	2.4%	0
	ingbourne Primary School	785,442	785,442	205	3,831.43	794,773	205 217	3,876.94	9,331	0	0	0	794,773	9,331	1.2% 2.1%	0
	irsons Down Infant School irsons Down Junior School	818,920 1,128,047	818,920 1,128,047	217 308	3,773.83 3,662.49	835,964 1,158,379	308	3,852.37 3,760.97	17,044 30,332	0	-651	-651	835,964 1,157,728	17,044 29,681	2.1%	0
94900 Pu	rley Church of England Primary School	486,276	486,276	112	4,341.75	491,599	112	4,389.28	5,324	0	0	0	491,599	5,324	1.1%	0
	bert Sandilands Primary School & Nursery aw-cum-Donnington Church of England Primary School	957,081 471,877	957,081 471,877	246 94	3,890.57 5,019.96	982,457 429,635	246 94	3,993.73 4,570.59	25,376 -42,241	0 44,007	-563 0	-563 44,007	981,893 473,642	24,813 1,765	2.6%	0
95200 Sh	efford Church of England Primary School	237,283	237,283	29	8,182.16	240,564	29	8,295.31	3,281	0	-472	-472	240,092	2,809	1.2%	0
	eenhamland Primary School vringfield Primary School	1,062,242 1,079,845	1,095,560 1,079,845	291 301	3,764.81 3,587.53	1,140,032 1,098,842	291 301	3,917.63 3,650.64	44,471 18,997	0	-15,113 0	-15,113	1,124,919 1,098,842	29,359 18,997	2.7% 1.8%	0
	purcroft Primary School	1,556,195		433	3,593.98	1,595,824	433	3,685.51	39,628	0	0	0	1,595,824	39,628	2.5%	0
	Finian's Catholic Primary School John the Evangelist Infant & Nursery School	736,784 684,718	736,784 684,718	197 180	3,740.02 3,803.99	762,712 694,201	197 180	3,871.63 3,856.67	25,927 9,483	0	-7,297 0	-7,297	755,414 694,201	18,630 9,483	2.5% 1.4%	0
	Joseph's Catholic Primary School	804,463	804,463	210	3,830.78	846,544	210	4,031.16	42,081	0	-21,456	-21,456	825,089	20,626	2.6%	0
	Nicolas Church of England Junior School	940,120	940,120	258	3,643.88	951,106	258	3,686.46	10,985	0	0	0	951,106	10,985	1.2%	0
	Pauls Catholic Primary School ockcross Church of England Primary School	1,144,663 428,993	1,144,663 428,993	325 101	3,522.04 4,247.46	1,192,932 424,220	325 101	3,670.56 4,200.20	48,269 -4,774	0 6,346	-17,445 0	-17,445 6,346	1,175,487 430,566	30,824 1,572	2.7% 0.4%	0
96400 Str	reatley Church of England Voluntary Controlled Primary S	436,667	436,667	98	4,455.78	431,445	98	4,402.50	-5,222	6,802	0	6,802	438,247	1,581	0.4%	0
	Ihamstead and Ufton Nervet Church of England Voluntan atcham Park Church of England Primary School	434,635 1,383,731	434,635 1,383,731	101 385	4,303.32 3,594.11	434,835 1,429,826		4,305.30 3,713.83	200 46,096	1,398 0	0 -8,446	1,398 -8,446	436,233 1,421,380	1,598 37,650	0.4%	0
96600 The	eale Church of England Primary School	995,698	1,026,915	285	3,603.21	1,025,879	285	3,599.58	-1,036	5,529	0	5,529	1,031,408	4,494	0.4%	0
	elford and Wickham Church of England Primary School estwood Farm Infant School	420,488 677,419	420,488 693,219	94 177	4,473.27	434,884 701,939	94 177	4,626.43 3,965.75	14,397 8,720	0	-5,951 0	-5,951	428,933 701,939	8,445	2.0%	0
	estwood Farm Junior School	824,671	840,372	224	3,916.49 3,751.66	843,177	224	3,965.75	2,805	757	0	757	843,934	8,720 3,562	0.4%	0
	hitelands Park Primary School	1,165,957		316	3,689.74	1,189,943		3,765.64	23,986	0	0	0	1,189,943	23,986	2.1%	0
	e Willows Primary School e Winchcombe School	1,353,646 1,574,421		344 405	3,935.02 4,022.24	1,420,385 1,518,147		4,129.03 3,748.51	66,739 -110,861	0 118,275	-30,341 0	-30,341 118,275	1,390,044 1,636,423	36,398 7,415	2.7% 0.5%	0
97300 Wo	colhampton Church of England Primary School	411,519	411,519	92	4,473.03	398,848	92	4,335.31	-12,671	14,153	0	14,153	413,001	1,482	0.4%	0
	ttendon Church of England Primary School enefield School	359,866 4,561,016		73 919	4,929.67 4,963.02	379,663 4,592,948		5,200.86 4,997.77	19,797 31,932	0	-13,229 0	-13,229	366,433 4,592,948	6,568 31,932	1.8% 0.7%	0
98800 The	e Downs School	4,265,350	4,265,350	898	4,749.83	4,195,136	898	4,671.64	-70,213	90,843	0	90,843	4,285,980	20,630	0.5%	0
	hn O'Gaunt Community Technology College	1,859,398		336	5,533.92	1,829,018		5,443.51	-30,380	38,740	0	38,740	1,867,758	8,360	0.4%	0
	ennet School tle Heath School	6,617,820 6,211,648		1,391 1,281	4,856.73 4,849.06	6,785,395 6,257,490		4,878.07 4,884.85	29,681 45,842	3,436 0	0	3,436 0	6,788,830 6,257,490	33,116 45,842	0.5% 0.7%	0
99300 Pa	Irk House School	3,924,019	3,924,019	793	4,948.32	3,926,644	793	4,951.63	2,625	16,383	0	16,383	3,943,027	19,008	0.5%	0
	Bartholomew's School eale Green School	6,109,196 2,717,548		1,264 551	4,833.22 5,053.67	6,055,878 2,828,725		4,791.04 5,133.80	-53,318 44,151	82,580 0	0	82,580 0	6,138,459 2,828,725	29,263 44,151	0.5%	0
	nity School & Performing Arts College	3,805,268		779	5,131.88	4,069,046		5,223.42	71,313	0	0	0	4,069,046	71,313	1.8%	0
99600 The	e Willink School	4,207,766	4,207,766	862	4,881.40	4,171,298	862	4,839.09	-36,468	56,434	0	56,434	4,227,732	19,966	0.5%	0
			51,368,240	13,261	3,862	51,997,838	13,261	3,921	629,598	350,961	-221,871	129,090	52,126,928	758,689		0
	CONDARY TOTAL DTAL ALL SCHOOLS		44,676,414 96,044,654	9,074 22,335	4,880	44,711,579 96,709,417	9,074 22,335	4,927	35,164 664,762	288,416 639,377	0 -221,871	288,416 417,506	44,999,994 97,126,923	323,580 1,082,269		0

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