

# Individual Decision

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The attached report will be taken as an Individual Portfolio Member Decision on:

**Wednesday 3 February 2021**

<b>Ref:</b>	<b>Title</b>	<b>Portfolio Member</b>	<b>Page No.</b>
ID3998	<b>Schools Funding Formula 2021/22</b>	Councillor Ross Mackinnon	3 - 10



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## Schools Funding Formula 2021/22

<b>Committee considering report:</b>	Individual Executive Member Decisions
<b>Date of Committee:</b>	3 February 2021
<b>Portfolio Member:</b>	Councillor Ross Mackinnon
<b>Report Author:</b>	Melanie Ellis
<b>Forward Plan Ref:</b>	ID3998

### 1 Purpose of the Report

- 1.1 To approve the final school funding formula allocations for 2021/22.

### 2 Recommendations

- 2.1 To approve that the 2021/22 school funding formula be allocated to schools.
- 2.2 To note that the Authority Proforma Tool (APT) was submitted to the DfE on 21 January 2021 based on the 0.25% approved transfer to the High Needs Block, and was re-submitted on 25 January 2021 to reflect the 0.5% transfer.
- 2.3 To note that the final formula rates and allocations to schools will be allocated to schools by 28<sup>th</sup> February 2021.

### 3 Implications and Impact Assessment

Implication	Commentary
<b>Financial:</b>	Allocation of £114.8m to schools
<b>Human Resource:</b>	n/a
<b>Legal:</b>	Need to allocate budgets to schools by 28.2.21
<b>Risk Management:</b>	n/a
<b>Property:</b>	n/a

Policy:	n/a			
	Positive	Neutral	Negative	Commentary
<b>Equalities Impact:</b>				
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x		
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		x		
<b>Environmental Impact:</b>		x		
<b>Health Impact:</b>		x		
<b>ICT Impact:</b>		x		
<b>Digital Services Impact:</b>		x		
<b>Council Strategy Priorities:</b>		x		
<b>Core Business:</b>		x		
<b>Data Impact:</b>		x		

<b>Consultation and Engagement:</b>	Consulted with all schools in October/November 2020. Consulted with Heads Funding Group and Schools Forum.
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## 4 Executive Summary

- 4.1 2021/22 is the fourth year of the National Funding Formula (NFF). As in previous years, the Local Authority (LA) continues to have discretion over their schools funding formulae, in consultation with local schools. The LA is responsible for making the final decisions on the formula. Political ratification is required for the LA to be able to issue budgets to maintained schools before the 28<sup>th</sup> February 2021.
- 4.2 A consultation was held with schools between 21.10.20 and 11.11.20. Responses were considered by the Schools Forum and a methodology for allocating the funding was agreed, including approval to transfer 0.25% of school funding to the High Needs block.
- 4.3 Final DSG allocations were received from the Department for Education (DfE) in December, which for schools totalled £114.83m including growth funding of £0.6m. Due to the cumulative balance on the growth fund being sufficient, it was agreed at Schools Forum on 26.1.21 to allocate the growth fund to schools via the formula, and to increase the transfer to the High Needs block to the maximum of 0.5%.

## 5 Supporting Information

### Introduction

- 5.1 2021/22 is the fourth year of the National Funding Formula (NFF). As in previous years, the Local Authority (LA) continues to have discretion over their schools funding formulae, in consultation with local schools. The LA is responsible for making the final decisions on the formula. Political ratification is required for the LA to be able to issue budgets to maintained schools before the 28<sup>th</sup> February 2021.
- 5.2 A consultation was held between 21.10.20 and 11.11.20. The responses were considered by the Schools Forum in December 2020, and the following agreed:
  - (a) To mirror the DfE's 2021/22 National Funding Formula
  - (b) To award a lower increase to the schools sparsity factor in the local formula
  - (c) To address any surplus or shortfall in funding by adjusting the AWPU values
  - (d) To apply a 0.25% top slice of the schools' funding, in order to support High Needs
  - (e) To approve the criteria for additional funds as per the consultation
  - (f) To approve the proposed de-delegations.
- 5.3 Final DSG allocations were received in December from the DfE totalling £114.83m, including growth funding of £0.6m. At the Schools Forum of 25 January 2021 it was agreed not to increase the growth fund and to allocate the 2021/22 growth funding via the formula and to increase the top slice of schools' funding from 0.25% to 0.5%, in order to support High Needs.

## Growth Funding 2021/22

- 5.4 The main DSG funding for schools is lagged and based on pupil numbers from the previous October census. Since 2019/20, growth funding is allocated to the local authority by formula and forms part of the Schools Block DSG. The formula for allocating growth funding to each LA is based on actual growth in pupil numbers.
- 5.5 As it is within the schools block, a movement of funding between the schools formula and the growth fund is not treated as a transfer between blocks. If funding is not required for growth, it can be added into the school formula, but if there is a shortfall, this needs to be met from a top slice of the main schools' block allocation.
- 5.6 The cumulative balance on the growth fund was £666k at 31.3.2020. The 2020/21 DSG growth allocation of £756k was all put aside for growth, but with an estimated spend of £150k, the fund could total £1.27m by 31.3.2021.

Growth Fund	Budget £	Spend £	Cumulative Balance £
2018/19	280,710	87,500	193,210
2019/20	655,800	183,048	665,962
2020/21	756,100	150,000	1,272,062

- 5.7 The DSG growth allocation for 2021/22 is £604k. The projected balance of the growth fund is sufficient, so it was agreed to use £274k of the 2021/22 growth allocation to increase the High Needs Block transfer from 0.25% as previously agreed, to 0.5%, and put the balance of £330k into the school formula and allocate to schools. The HNB additional funding would be on a spend to save basis supporting initiatives that will support the block to reduce its annual expenditure over time.

## Final School Funding

- 5.8 The final schools block DSG funding allocation for 2021/22 is £114.83m, and after the 0.5% HNB transfer of £0.549m, there is £114.28m available for schools.

Final DSG Allocation	2020/21		2021/22	
		£		£
Primary schools unit of funding (£s)	£4,088		£4,443	
Number of pupils in primary schools	13,190		13,122	
<b>Primary funding</b>		<b>53,921,775</b>		<b>58,296,060</b>
Secondary schools unit of funding (£s)	£5,108		£5,537	
Number of pupils in secondary schools	9,621		9,832	
<b>Secondary funding</b>		<b>49,146,132</b>		<b>54,436,539</b>
Premises		1,487,173		1,495,197
Growth funding		756,100		603,831
<b>Total allocation including pay and pensions</b>		<b>105,311,180</b>		<b>114,831,627</b>
HNB transfer (0.25% 20/21; 0.5% 21/22)		-263,285		-548,568
<b>Total school funding</b>		<b>105,047,895</b>		<b>114,283,060</b>
<i>Pay and Pensions element</i>		0		-5,118,061
<b>Total before pay and pensions</b>		<b>210,095,790</b>		<b>109,713,566</b>

## Formula Rates

Factor	National Rate	WBC National Rate (with ACA)	Final rate	National Rate	WBC National Rate (with ACA)	Rate at 0.5% transfer	Final Funding 0.25% transfer	Final Funding 0.5% transfer
	2020/21			2021/22			2020/21	2021/22
<b>Basic per pupil funding</b>								
Primary AWPU	£2,857	£2,956	£2,941	£3,123	£3,231	£3,230	£38,848,003	£42,437,881
KS3 AWPU	£4,018	£4,157	£4,137	£4,404	£4,557	£4,547	£24,956,306	£28,149,921
KS4 AWPU	£4,561	£4,719	£4,696	£4,963	£5,135	£5,124	£16,862,164	£18,672,063
<b>Minimum per pupil</b>								
Primary	£3,750			£4,180				
Secondary	£5,000			£5,415				
<b>Additional needs funding</b>								
<b>Deprivation</b>								
Primary FSM	£450	£466	£466	£460	£476	£476	£4,042,914	£4,459,755
Secondary FSM	£450	£466	£466	£460	£476	£476		
Primary FSM6	£560	£579	£579	£575	£595	£595		
Secondary FSM6	£815	£843	£843	£840	£869	£869		
Primary IDACI A	£600	£621	£621	£620	£642	£642		
Primary IDACI B	£435	£450	£450	£475	£491	£491		
Primary IDACI C	£405	£419	£419	£445	£460	£460		
Primary IDACI D	£375	£388	£388	£410	£424	£424		
Primary IDACI E	£250	£259	£259	£260	£269	£269		
Primary IDACI F	£210	£217	£217	£215	£222	£222		
Secondary IDACI A	£840	£869	£869	£865	£895	£895		
Secondary IDACI B	£625	£647	£647	£680	£704	£704		
Secondary IDACI C	£580	£600	£600	£630	£652	£652		
Secondary IDACI D	£535	£554	£554	£580	£600	£600		
Secondary IDACI E	£405	£419	£419	£415	£429	£429		
Secondary IDACI F	£300	£310	£310	£310	£321	£321		
<b>Low Prior Attainment</b>								
Primary LPA	£1,065	£1,102	£1,102	£1,095	£1,133	£1,133	£3,879,823	£3,754,603
Secondary LPA	£1,610	£1,666	£1,686	£1,660	£1,718	£1,718	£3,373,235	£3,693,631
<b>English as an Additional Language</b>								
Primary EAL	£535	£554	£554	£550	£569	£569	£469,603	£458,637
Secondary EAL	£1,440	£1,490	£1,490	£1,485	£1,537	£1,537	£136,152	£125,342
<b>Mobility</b>								
Primary Mobility	£875	£905	£905	£900	£931	£931	£53,507	£19,555
Secondary Mobility	£1,250	£1,293	£1,293	£1,290	£1,335	£1,335	£0	£0
<b>School led funding</b>								
<b>Lump Sum</b>								
Primary	£114,400	£118,370	£118,370	£117,800	£121,885	£121,885	£9,065,145	£9,334,360
Secondary	£114,400	£118,370	£118,370	£117,800	£121,885	£121,885		
<b>Sparsity</b>								
Primary	£26,000	£26,902	£26,902	£45,000	£46,562	£35,000	£193,689	£257,078
Secondary	£67,600	£69,946	£69,946	£70,000	£72,428	£72,428		
<b>Premises</b>								
Primary	18/19 estimate			19/20 estimate			£1,495,196	£1,566,240
Secondary	18/19 estimate			19/20 estimate				
<b>Total Allocation (excluding minimum per pupil funding level and MFG funding total)</b>							£103,375,737	£112,929,067
Additional funding to meet the minimum funding level							£777,576	£1,202,627
<b>Total Allocation including minimum funding adj</b>							£104,153,313	£114,131,694
MFG adjustment							£138,484	£151,366
<b>Post MFG budget</b>							£104,291,797	£114,283,060
Growth fund							£756,100	£0
<b>Total for Schools Block allocation</b>							£105,047,897	£114,283,060
Transfer to High Needs Block							£263,285	£548,568
<b>DSG Schools Block DfE allocation</b>							£105,311,182	£114,831,628

## Proposals

5.9 To approve the final school funding formula allocations for 2021/22.

## 6 Appendices

6.1 Appendix A – final school funding allocations

### Background Papers:

School Forum papers between October 2020 and January 2021

### 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 Committee or associated Task Groups within preceding six months
- Item is Urgent Key Decision
- Report is to note only

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### Document Control

Document Ref:		Date Created:	26.1.21
Version:	1	Date Modified:	
Author:	Melanie Ellis		
Owning Service	Finance and Property		

### Change History

Version	Date	Description	Change ID
1			
2			



# Appendix A

APPENDIX A): Funding formula 2021/22		2020/21 FINAL ALLOCATION (after 0.25% HNB contribution) *Does not include teacher pay and pension			2021/22 ALLOCATION (after primary cap on sparsity, 0.5% HNB transfer and no growth fund)		
School Name	Phase	Pupil count Oct 2019	Formula allocated	Per pupil funding	Pupil count Oct 2020	Indicative allocation	Per pupil funding
Aldermaston C.E. Primary School	Primary	148	£645,892	£4,364	142	£687,609	£4,842
Basildon C.E. Primary School	Primary	153	637462	4166	151	£678,560	£4,494
Beedon C.E. (Controlled) Primary School	Primary	49	£306,572	£6,257	50	£350,969	£7,019
Beenham Primary School	Primary	56	£322,114	£5,752	54	£337,155	£6,244
Birch Copse Primary School	Primary	421	£1,603,634	£3,809	425	£1,801,600	£4,239
Bradfield C.E. Primary School	Primary	159	£650,845	£4,093	158	£700,702	£4,435
Brightwalton C.E. Aided Primary School	Primary	88	£430,235	£4,889	103	£528,132	£5,127
Brimpton C.E. Primary School	Primary	52	£314,852	£6,055	58	£361,866	£6,239
Bucklebury C.E. Primary School	Primary	118	£530,361	£4,495	111	£541,093	£4,875
Burghfield St Mary's C.E. Primary School	Primary	209	£820,786	£3,927	213	£905,902	£4,253
Calcot Infant School and Nursery	Primary	198	£857,581	£4,331	180	£874,205	£4,857
Calcot Junior School	Primary	279	£1,153,506	£4,134	277	£1,217,080	£4,394
Chaddleworth St Andrew's C.E. Primary School	Primary	30	£234,519	£7,817	30	£255,084	£8,503
Chieveley Primary School	Primary	201	£788,005	£3,920	203	£878,609	£4,328
Cold Ash St Mark's CE Primary School	Primary	183	£716,918	£3,918	177	£756,803	£4,276
Compton C.E. Primary School	Primary	194	£794,950	£4,098	187	£834,260	£4,461
Curridge Primary School	Primary	102	£450,807	£4,420	99	£472,437	£4,772
Denefield School	Secondary	973	£4,957,510	£5,095	960	£5,275,077	£5,495
Downsway Primary School	Primary	214	£858,139	£4,010	213	£914,436	£4,293
Enborne C.E. Primary School	Primary	70	£355,120	£5,073	73	£389,087	£5,330
Englefield C.E. Primary School	Primary	97	£436,424	£4,499	99	£472,093	£4,769
Falkland Primary School	Primary	453	£1,727,799	£3,814	424	£1,800,333	£4,246
Fir Tree Primary School and Nursery	Primary	177	£789,068	£4,458	180	£860,002	£4,778
Francis Baily Primary School	Primary	581	£2,186,515	£3,763	586	£2,457,411	£4,194
Garland Junior School	Primary	221	£915,935	£4,145	206	£931,227	£4,521
Hampstead Norreys C.E. Primary School	Primary	89	£432,073	£4,855	88	£455,254	£5,173
Hermitage Primary School	Primary	181	£732,987	£4,050	183	£796,300	£4,351
Highwood Copse Primary School	Primary	17.5	£128,013	£7,315	17.5	£135,694	£7,754
Hungerford Primary School	Primary	357	£1,381,260	£3,869	359	£1,542,768	£4,297
Inkpen Primary School	Primary	66	£343,139	£5,199	60	£352,759	£5,879
John O'gaunt School	Secondary	381	£2,193,069	£5,756	405	£2,499,111	£6,171
John Rankin Infant and Nursery School	Primary	254	£983,078	£3,870	268	£1,139,614	£4,252
John Rankin Junior School	Primary	351	£1,343,154	£3,827	351	£1,491,753	£4,250
Kennet School	Secondary	1484	£7,502,709	£5,056	1490	£8,220,960	£5,517
Kennet Valley Primary School	Primary	197	£866,685	£4,399	193	£903,115	£4,679
Kintbury St Mary's C.E. Primary School	Primary	159	£681,077	£4,284	145	£682,534	£4,707
Lambourn CofE Primary School	Primary	177	£773,146	£4,368	166	£792,018	£4,771
Little Heath School	Secondary	1282	£6,564,380	£5,120	1290	£7,239,682	£5,612
Long Lane Primary School	Primary	214	£857,971	£4,009	214	£932,011	£4,355
Mortimer St John's C.E. Infant School	Primary	170	£702,643	£4,133	172	£757,147	£4,402
Mortimer St Mary's C.E. Junior School	Primary	212	£828,791	£3,909	232	£973,795	£4,197
Mrs Bland's Infant School	Primary	174	£760,534	£4,371	176	£833,421	£4,735
Pangbourne Primary School	Primary	196	£806,010	£4,112	200	£878,435	£4,392
Park House School	Secondary	905	£4,627,987	£5,114	969	£5,380,069	£5,552
Parsons Down Infant School	Primary	135	£606,637	£4,494	129	£637,530	£4,942
Parsons Down Junior School	Primary	268	£1,059,734	£3,954	232	£1,003,609	£4,326
Purley CofE Primary School	Primary	103	£481,999	£4,680	104	£518,903	£4,989
Robert Sandilands Primary School & Nursery	Primary	238	£1,011,898	£4,252	233	£1,053,050	£4,520
Shaw-cum-Donnington C.E. Primary School	Primary	80	£430,911	£5,386	86	£480,348	£5,585
Shefford C.E. Primary School	Primary	44	£303,915	£6,907	53	£366,233	£6,910
Speenhamland School	Primary	311	£1,272,760	£4,092	298	£1,303,777	£4,375
Springfield Primary School	Primary	300	£1,150,779	£3,836	302	£1,287,460	£4,263
Spurcroft Primary School	Primary	446	£1,736,503	£3,894	450	£1,944,213	£4,320
St Bartholomew's School	Secondary	1332	£6,720,699	£5,046	1341	£7,340,521	£5,474
St Finian's Catholic Primary School	Primary	186	£747,768	£4,020	194	£829,284	£4,275
St John the Evangelist C.E. Nursery and Infant	Primary	180	£732,554	£4,070	178	£781,741	£4,392
St Joseph's Catholic Primary School	Primary	211	£884,671	£4,193	200	£909,200	£4,546
St Nicolas C.E. Junior School	Primary	256	£973,888	£3,804	256	£1,076,916	£4,207
St Paul's Catholic Primary School	Primary	311	£1,183,211	£3,805	315	£1,321,480	£4,195
Stockcross C.E. School	Primary	103	£456,670	£4,434	103	£492,076	£4,777
Strealey C.E. Voluntary Controlled School	Primary	99	£453,237	£4,578	102	£488,000	£4,784
Sulhamstead and Ufton Nerve School	Primary	101	£454,813	£4,503	100	£490,631	£4,906
Thatcham Park CofE Primary	Primary	349	£1,383,105	£3,963	340	£1,475,210	£4,339
The Downs School	Secondary	954	£4,797,446	£5,029	988	£5,377,573	£5,443
The Ilsleys Primary School	Primary	67	£354,914	£5,297	63	£376,083	£5,970
The Willink School	Secondary	951	£4,862,677	£5,113	970	£5,373,259	£5,539
The Willows Primary School	Primary	364	£1,597,566	£4,389	370	£1,738,607	£4,699
The Winchcombe School	Primary	438	£1,801,824	£4,114	441	£1,933,530	£4,384
Theale C.E. Primary School	Primary	312	£1,197,351	£3,838	310	£1,375,725	£4,438
Theale Green School	Secondary	439	£2,376,198	£5,413	469	£2,762,691	£5,891
Trinity School	Secondary	923	£4,911,911	£5,322	953	£5,460,807	£5,730
Welford and Wickham C.E. Primary School	Primary	98	£468,364	£4,779	88	£487,162	£5,536
Westwood Farm Infant School	Primary	177	£744,298	£4,205	177	£798,233	£4,510
Westwood Farm Junior School	Primary	238	£957,249	£4,022	237	£1,029,586	£4,344
Whitelands Park Primary School	Primary	341	£1,320,379	£3,872	358	£1,502,363	£4,197
Woolhampton C.E. Primary School	Primary	93	£423,975	£4,559	106	£502,427	£4,740
Yattendon C.E. Primary School	Primary	91	£437,639	£4,809	92	£476,661	£5,181
<b>High Needs Block</b>						<b>£548,568</b>	
<b>Growth Fund</b>						<b>£0</b>	
<b>Primary Total</b>			<b>£54,777,210</b>			<b>£59,353,309</b>	
<b>Secondary Total</b>			<b>£49,514,587</b>			<b>£54,929,751</b>	
<b>Total all Schools per DfE</b>		<b>22,832</b>	<b>£104,291,796</b>		<b>22,976</b>	<b>£114,831,628</b>	

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