
Schools Funding Formula 2023/24:

Report being considered by: Schools Forum on 23rd January 2023

Report Author: Melanie Ellis

Item for: Information/ Decision **By:** All Forum Members /Maintained Primary Members

1. Purpose of the Report

1.1 To set out the final school funding formula allocations for 2023/24 and to review the consultation on the Primary Schools in Financial Difficulty Fund.

2. Recommendations

2.1 Recommend the following for setting the school funding formula for 2023/24, for approval at Schools Forum and to go as a recommendation for political ratification:

- (a) To note the final formula rates and allocations to schools, subject to political ratification and allocation to schools by 28th February 2023. The allocations have been made according to the principles agreed by Schools Forum in December and in relation to the total funding available from the Schools Block DSG allocation.
- (b) To review the consultation responses on the Primary Schools in Financial Difficulty Fund and the Heads Funding Group recommendation, and make a decision on the fund.

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>
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3. Introduction

3.1 2023/24 is the first year of transition to the direct schools National Funding Formula (NFF). Each Local Authority (LA) will continue to have some discretion over their schools funding formulae, in consultation with local schools. The LA is responsible for making the final decisions on the formula.

3.2 Political ratification is required for the LA to be able to issue budgets to maintained schools. Allocations must be distributed to schools by 28th February 2023.

3.3 A consultation was held between 19 October 2022 and 9 November 2022. The responses were considered by the Schools Forum in December 2022, and the following agreed:

- (a) To mirror the Department for Education's (DfE) 2023/24 National Funding Formula (NFF) to calculate the funding allocations.
- (b) To use the minimum sparsity factor.

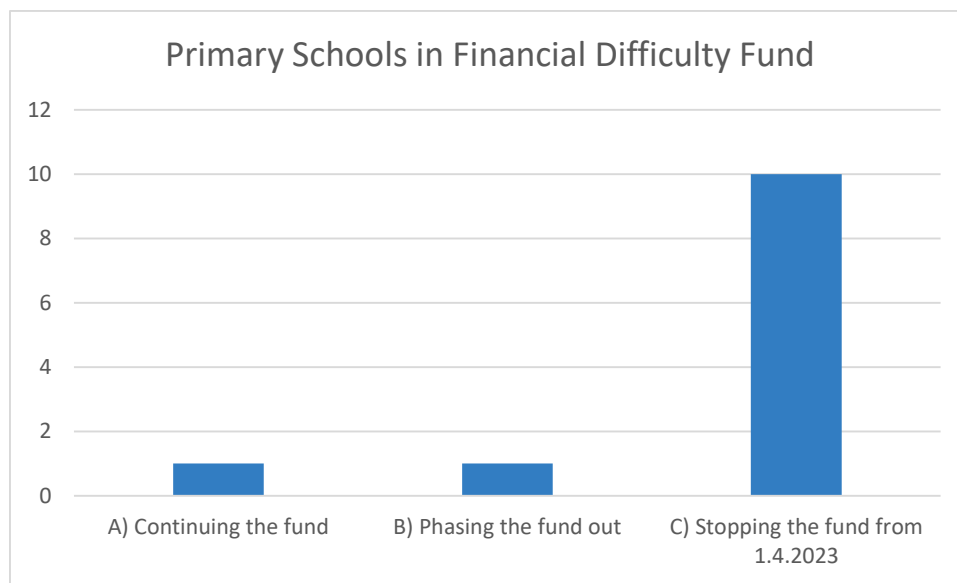
- (c) To address any surplus or shortfall in funding by adjusting the AWPU values.
- (d) To not top slice any of the schools' funding to support the High Needs Block.
- (e) To not reinstate the Falling Rolls fund.
- (f) To approve the criteria to be used to allocate additional funds.
- (g) To approve the proposed services to be de-delegated, but to defer a decision on the Primary Schools in Financial Difficulty Fund (PSIFD) to the next meeting.

3.4 A consultation has since been held with Primary Schools on the PSIFD.

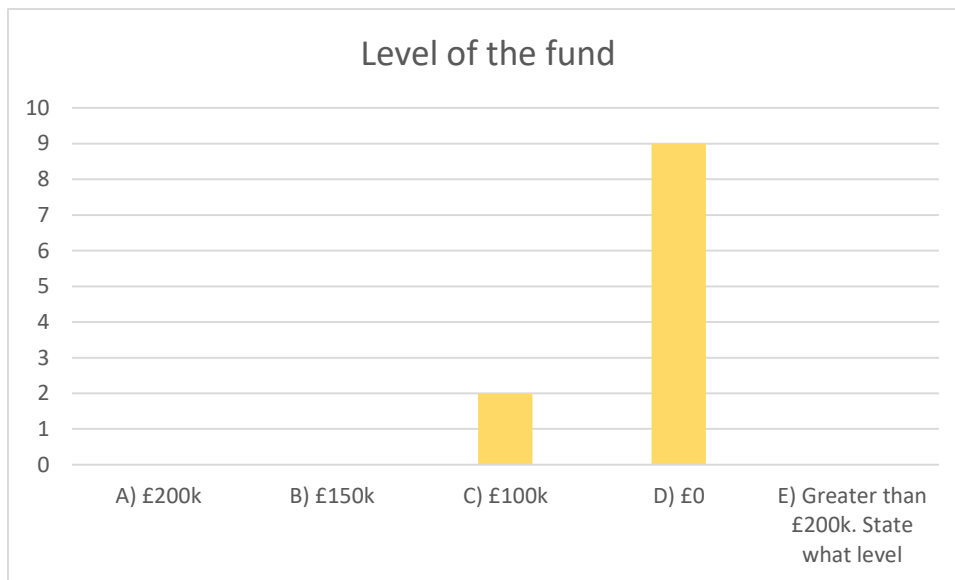
4. Consultation on the Primary Schools in Financial Difficulty Fund

4.1 Twelve schools responded and the results are shown below:

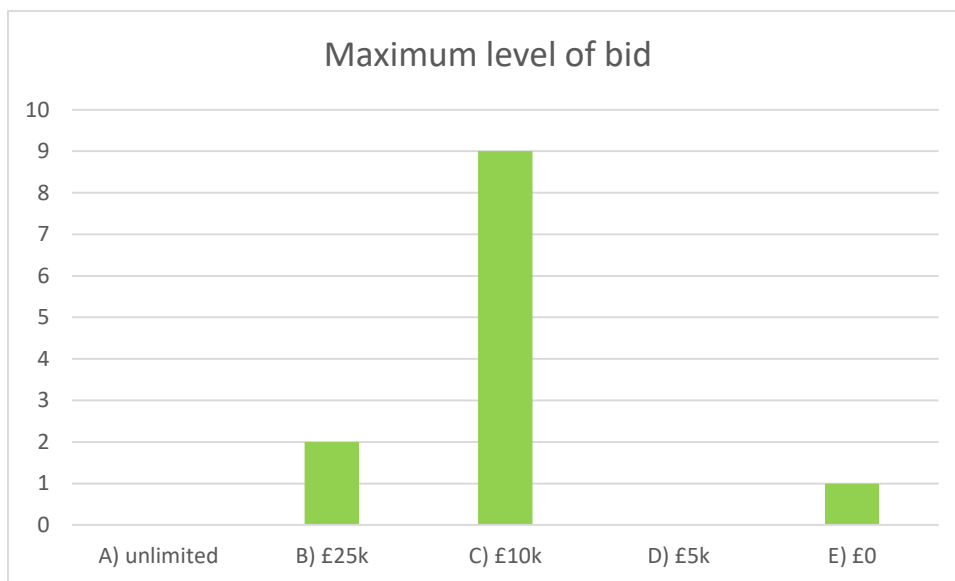
1. Regarding the Primary Schools in Financial Difficulty Fund, would you be in favour of:
A) Continuing the fund
B) Phasing the fund out
C) Stopping the fund from 1.4.2023



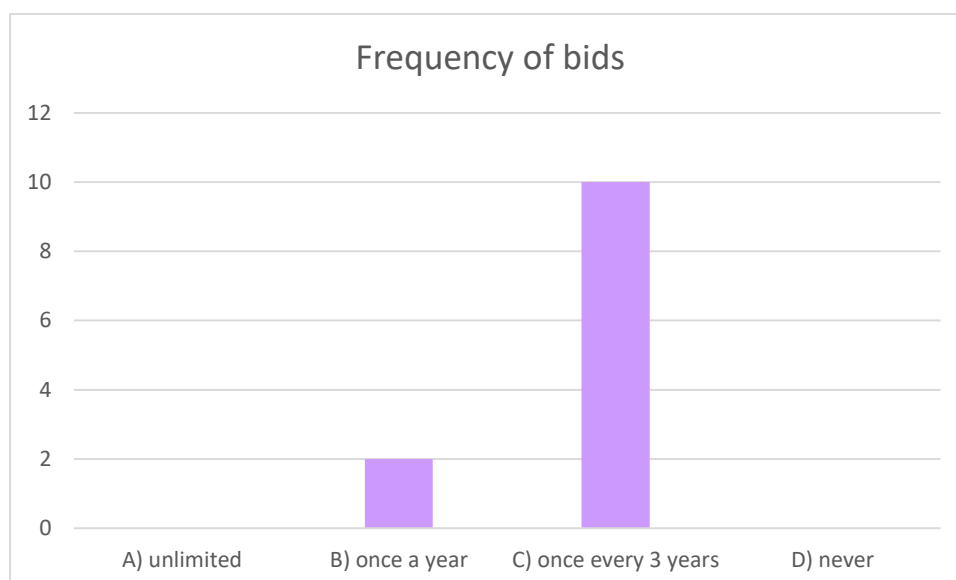
2. What level do you think the fund should be?
A) £200k
B) £150k
C) £100k
D) £0
E) Greater than £200k. State what level



3. Should there be a maximum level of bid?
A) unlimited
B) £25k
C) £10k
D) £5k
E) £0



4. How often should bids be allowed?
A) unlimited
B) once a year
C) once every 3 years
D) never



4.2 Comments

I am in favour of stopping the fund completely as I have seen over the years how difficult it is to make constructive decisions on funding that are fair and equitable to all. I believe that with all schools struggling financially at the moment this will only get harder and am strongly in favour of stopping the fund.

I think very many schools are in financial difficulties and it would be almost impossible to make fair and equitable decisions about funding.

4.3 Balance on the fund

Two bids were approved at the last Schools Forum, and the balance on the fund is now £39k.

4.4 Summary of survey is as follows:

- (1) To stop the fund
- (2) To move to a zero balance
- (3) If the fund were continuing, to have a maximum bid of £10k
- (4) If the fund were continuing, to only allow a bid every 3 years

4.5 Heads Funding Group Recommendation

To stop the fund immediately and to re-distribute the balance of £39k back to primary schools via the de-delegations mechanism.

5. Final School Funding

- 5.1 The DfE funding allocation for 2023-24 is £127.44m and after NNDR direct allocations, there is £125.8m available for the schools formula distribution.

Schools Funding Formula 2023/24:

		2023/24		
Schools Block	2022/23 Total funding	Unit of funding	Number of pupils	Total funding
Primary	59,679,321	4,832.32	12,936.50	62,513,308
Secondary	57,946,639	6,034.83	10,348.50	62,451,439
Premises factor (NNDR)	1,566,240			1,589,347
DfE allocation	119,192,200			126,554,094
Growth	874,544			885,348
Total block allocation	120,066,744			127,439,442
Block transfer	- 300,165			-
Total formula funding	119,766,579			127,439,442
NNDR direct allocation 2022/23	- 1,566,240			- 1,597,037
Total schools block after deductions	118,200,339			125,842,405

6. Final Formula

Factor	National Rate	WBC National Rate (with ACA)	Rate after 0.25% transfer & growth funding	National Rate	WBC National Rate (with ACA)	WBC final rate	Total Funding after 0.25% transfer & growth funding	Total Funding after 0% transfer & growth funding
	2022/23			2023/24			2022/23	2023/24
Basic per pupil funding								
Primary AWPU	£3,217	£3,329	£3,343	£3,394	£3,512	£3,509	£43,509,329	£45,469,963
KS3 AWPU	£4,536	£4,694	£4,714	£4,785	£4,952	£4,947	£29,826,898	£31,321,847
KS4 AWPU	£5,112	£5,290	£5,313	£5,393	£5,581	£5,575	£20,289,797	£22,417,594
Minimum per pupil								
Primary	£4,265	£4,265	£4,265	£4,405	£4,405	£4,405		
Secondary	£5,525	£5,525	£5,525	£5,715	£5,715	£5,715		
Additional needs funding								
Deprivation								
Primary FSM	£470	£486	£486	£480	£497	£497		
Secondary FSM	£470	£486	£486	£480	£497	£497		
Primary FSM6	£590	£611	£611	£705	£730	£730		
Secondary FSM6	£865	£895	£895	£1,030	£1,066	£1,066		
Primary IDACI A	£640	£662	£662	£670	£693	£693		
Primary IDACI B	£490	£507	£507	£510	£528	£528		
Primary IDACI C	£460	£476	£476	£480	£497	£497		
Primary IDACI D	£420	£435	£435	£440	£455	£455		
Primary IDACI E	£270	£279	£279	£280	£290	£290		
Primary IDACI F	£220	£228	£228	£230	£238	£238		
Secondary IDACI A	£890	£921	£921	£930	£962	£962		
Secondary IDACI B	£700	£724	£724	£730	£755	£755		
Secondary IDACI C	£650	£673	£673	£680	£704	£704		
Secondary IDACI D	£595	£616	£616	£620	£642	£642		
Secondary IDACI E	£425	£440	£440	£445	£460	£460		
Secondary IDACI F	£320	£331	£331	£335	£347	£347		
Low Prior Attainment								
Primary LPA	£1,130	£1,169	£1,169	£1,155	£1,195	£1,195	£3,780,358	£4,146,645
Secondary LPA	£1,710	£1,769	£1,769	£1,750	£1,811	£1,811	£3,961,148	£4,137,677
English as an Additional Language								
Primary EAL	£565	£585	£585	£580	£600	£600	£492,907	£601,097
Secondary EAL	£1,530	£1,583	£1,583	£1,565	£1,619	£1,619	£166,597	£331,285
Mobility								
Primary Mobility	£925	£957	£957	£945	£978	£978	£54,461	£79,131
Secondary Mobility	£1,330	£1,376	£1,376	£1,360	£1,407	£1,407	£0	£0
School led funding								
Lump Sum								
Primary	£121,300	£125,515	£125,515	£128,000	£132,454	£132,454		
Secondary	£121,300	£125,515	£125,515	£128,000	£132,454	£132,454	£9,664,655	£10,198,989
Sparsity								
Primary	£55,000	£56,911	£45,529	£56,300	£58,259	£48,015		
Secondary	£80,000	£82,780	£66,224	£81,900	£84,750	£69,850	£687,071	£742,348
Premises								
Primary								
Secondary							£1,558,549	£1,597,013
Total Allocation (excluding minimum per pupil funding level and MFG funding total)							£119,056,814	£127,105,116
Factor							Total Funding after 0.25% transfer & growth funding	Total Funding after 0% transfer & growth funding
							2022/23	2023/24
Total Allocation (excluding minimum per pupil funding level and MFG funding total)							£119,056,814	£127,105,116
Additional funding to meet the minimum funding level							£637,221	£273,538
Total Allocation including minimum funding adj							£119,694,036	£127,378,654
MFG adjustment							£72,543	£60,788
Post MFG budget							£119,766,579	£127,439,442
Other adjustments								
Growth fund							£0	£0
Total funding for Schools Block Formula							£119,766,579	£127,439,442
Amount of block transfer							£300,166	£0
NNDR allocation							-£1,566,240	-£1,597,037
DSG Schools Block DfE allocation							£118,500,505	£125,842,405

Appendix A

2023/24 School Formula Allocations					2023/24 FINAL ALLOCATION			YEAR ON YEAR CHANGE		
APPENDIX A) PROVISIONAL ALLOCATIONS 2023/24					(after 0.25% HNB transfer)			(no block transfer)		
School Name	Phase	Pupil count Oct 2021	Formula allocated	Per pupil funding	Pupil count Oct 2022	Indicative allocation	Indicative per pupil funding	2023/24 increase in total cash	2023/24 increase in per pupil total funding	% change
Aldermaston C.E. Primary School	Primary	131	£676,338	£5,163	120	£676,062	£5,634	£277	£471	0%
Basildon C.E. Primary School	Primary	159	£721,532	£4,538	154	£743,421	£4,827	£21,888	£289	3%
Beedon C.E. (Controlled) Primary School	Primary	47	£363,710	£7,739	44	£380,915	£8,657	£17,205	£919	5%
Beenharn Primary School	Primary	50	£377,963	£7,559	62	£486,665	£7,849	£108,702	£290	22%
Birch Copse Primary School	Primary	425	£1,837,575	£4,324	423	£1,888,915	£4,466	£51,340	£142	3%
Bradfield C.E. Primary School	Primary	156	£709,555	£4,548	142	£704,372	£4,960	£5,184	£412	-1%
Brightwalton C.E. Aided Primary School	Primary	99	£520,871	£5,261	99	£554,385	£5,600	£33,514	£339	6%
Brimpton C.E. Primary School	Primary	54	£384,277	£7,116	59	£434,498	£7,364	£50,222	£248	13%
Bucklebury C.E. Primary School	Primary	114	£574,625	£5,041	122	£646,662	£5,301	£72,037	£260	13%
Burghfield St Mary's C.E. Primary School	Primary	204	£916,205	£4,491	214	£1,003,625	£4,690	£87,420	£199	10%
Calcot Infant School and Nursery	Primary	201	£998,552	£4,968	218	£1,116,676	£5,122	£118,124	£154	12%
Calcot Junior School	Primary	272	£1,266,995	£4,658	281	£1,385,416	£4,930	£118,421	£272	9%
Chaddleshore St Andrew's C.E. Primary School	Primary	30	£295,409	£9,847	23	£282,995	£12,304	£12,413	£2,457	-4%
Chieveley Primary School	Primary	198	£880,549	£4,447	191	£902,359	£4,724	£21,810	£277	2%
Cold Ash St Mark's CE Primary School	Primary	178	£776,115	£4,360	187	£856,424	£4,580	£80,309	£220	10%
Compton C.E. Primary School	Primary	188	£873,912	£4,648	183	£909,998	£4,973	£36,086	£324	4%
Curridge Primary School	Primary	92	£477,390	£5,189	93	£532,041	£5,721	£54,650	£532	11%
Denefield School	Secondary	958	£5,478,345	£5,719	961	£5,801,004	£6,036	£322,658	£318	6%
Downsway Primary School	Primary	214	£940,323	£4,394	213	£980,801	£4,605	£40,478	£211	4%
Enborne C.E. Primary School	Primary	75	£432,624	£5,768	77	£467,362	£6,070	£34,737	£301	8%
Englefield C.E. Primary School	Primary	105	£509,464	£4,852	109	£549,952	£5,045	£40,488	£193	8%
Falkland Primary School	Primary	420	£1,819,150	£4,331	423	£1,892,182	£4,473	£73,033	£142	4%
Fir Tree Primary School and Nursery	Primary	183	£905,073	£4,946	196	£1,032,793	£5,269	£127,720	£324	14%
Francis Baily Primary School	Primary	557	£2,386,582	£4,285	549	£2,433,454	£4,433	£46,872	£148	2%
Garland Junior School	Primary	230	£1,078,574	£4,689	235	£1,171,302	£4,984	£92,729	£295	9%
Hampstead Norreys C.E. Primary School	Primary	89	£526,053	£5,911	75	£502,350	£6,698	£23,703	£787	-5%
Hermitage Primary School	Primary	195	£865,645	£4,439	191	£896,332	£4,693	£30,687	£254	4%
Highwood Copse Primary School	Primary	41.5	£269,377	£6,491	73.5	£453,228	£6,166	£183,851	£325	68%
Hungerford Primary School	Primary	348	£1,544,664	£4,439	360	£1,694,871	£4,708	£150,207	£469	10%
Inkpen Primary School	Primary	64	£436,733	£6,824	56	£436,830	£7,801	£97	£977	0%
John O'gaunt School	Secondary	405	£2,586,919	£6,387	430	£2,913,015	£6,774	£326,096	£387	13%
John Rankin Infant and Nursery School	Primary	251	£1,095,149	£4,363	230	£1,090,655	£4,742	£4,494	£379	0%
John Rankin Junior School	Primary	478	£1,551,186	£4,333	357	£1,598,567	£4,478	£47,381	£145	3%
Kennet School	Secondary	1512	£8,702,248	£5,755	1517	£9,275,846	£6,115	£573,598	£359	7%
Kennet Valley Primary School	Primary	204	£981,989	£4,814	201	£1,006,035	£5,005	£24,046	£191	2%
Kintbury St Mary's C.E. Primary School	Primary	145	£705,837	£4,868	140	£745,651	£5,326	£39,814	£458	6%
Lambourn CofE Primary School	Primary	169	£834,783	£4,940	157	£846,199	£5,390	£11,417	£450	1%
Little Heath School	Secondary	1314	£7,636,913	£5,812	1325	£8,156,374	£6,156	£519,462	£344	7%
Long Lane Primary School	Primary	210	£952,491	£4,536	214	£1,025,835	£4,794	£73,344	£258	8%
Mortimer St John's C.E. Infant School	Primary	172	£786,682	£4,574	174	£833,328	£4,789	£46,645	£216	6%
Mortimer St Mary's C.E. Junior School	Primary	237	£1,016,095	£4,287	242	£1,110,830	£4,590	£94,734	£303	9%
Mrs Bland's Infant School	Primary	155	£785,053	£5,065	154	£855,031	£5,552	£69,978	£487	9%
Pangbourne Primary School	Primary	191	£870,610	£4,558	174	£870,191	£5,001	£420	£443	0%
Park House School	Secondary	1037	£6,013,904	£5,799	975	£5,981,844	£6,135	£32,060	£336	-1%
Parsons Down Infant School	Primary	107	£573,032	£5,355	117	£645,341	£5,516	£72,309	£160	13%
Parsons Down Junior School	Primary	233	£1,059,760	£4,548	179	£897,814	£5,016	£161,946	£467	-15%
Purley CofE Primary School	Primary	104	£537,596	£5,169	98	£547,591	£5,588	£9,995	£418	2%
Robert Sandilands Primary School and Nursery	Primary	232	£1,084,868	£4,676	212	£1,064,726	£5,022	£20,143	£346	-2%
Shaw-cum-Donnington C.E. Primary School	Primary	90	£503,662	£5,596	93	£541,304	£5,820	£37,642	£224	7%
Shefford C.E. Primary School	Primary	60	£412,259	£6,871	56	£416,960	£7,446	£4,701	£575	1%
Speenhamland School	Primary	278	£1,253,033	£4,507	276	£1,350,480	£4,893	£97,446	£386	8%
Springfield Primary School	Primary	404	£1,321,510	£4,347	309	£1,411,308	£4,567	£89,798	£220	7%
Spurcroft Primary School	Primary	317	£1,847,643	£4,431	398	£1,830,292	£4,599	£17,352	£168	-1%
St Bartholomew's School	Secondary	1350	£7,537,756	£5,584	1353	£7,869,865	£5,817	£332,109	£233	4%
St Finian's Catholic Primary School	Primary	193	£847,232	£4,390	196	£897,399	£4,579	£50,166	£189	6%
St John the Evangelist C.E. Nursery and Infant Sch	Primary	178	£833,279	£4,681	180	£889,131	£4,940	£55,852	£258	7%
St Joseph's Catholic Primary School	Primary	203	£939,971	£4,630	213	£1,047,636	£4,918	£107,665	£288	11%
St Nicolas C.E. Junior School	Primary	247	£1,061,896	£4,299	251	£1,128,782	£4,497	£66,886	£198	6%
St Paul's Catholic Primary School	Primary	319	£1,365,893	£4,282	304	£1,376,501	£4,528	£10,608	£246	1%
Stockcross C.E. School	Primary	100	£529,228	£5,295	90	£525,264	£5,836	£4,263	£41	-1%
Strealey C.E. Voluntary Controlled School	Primary	103	£508,161	£4,934	99	£530,635	£5,360	£22,474	£246	4%
Sulhamstead and Ufton Nervet School	Primary	95	£501,767	£5,282	102	£557,333	£5,464	£55,565	£182	11%
Thatcham Park CofE Primary	Primary	325	£1,466,096	£4,511	337	£1,578,527	£4,684	£112,431	£173	8%
The Downs School	Secondary	1016	£5,657,639	£5,569	1047	£6,126,951	£5,852	£469,312	£283	8%
The Ilsleys Primary School	Primary	61	£396,896	£6,506	60	£418,136	£6,969	£21,240	£462	5%
The Willink School	Secondary	1007	£5,837,873	£5,797	1026	£6,288,062	£6,129	£450,189	£331	8%
The Willows Primary School	Primary	336	£1,644,272	£4,894	348	£1,784,838	£5,129	£140,566	£235	9%
The Wincombe School	Primary	448	£1,997,332	£4,458	441	£2,033,173	£4,610	£35,841	£152	2%
Theale C.E. Primary School	Primary	311	£1,406,001	£4,521	318	£1,406,969	£4,424	£967	£96	0%
Theale Green School	Secondary	546	£3,316,666	£6,074	634	£4,082,632	£6,439	£765,966	£365	23%
Trinity School	Secondary	1001	£5,966,687	£5,961	1085	£6,775,073	£6,244	£808,386	£284	14%
Welford and Wickham C.E. Primary School	Primary	80	£482,218	£6,028	72	£471,020	£6,542	£11,198	£14	-2%
Westwood Farm Infant School	Primary	180	£835,309	£4,641	179	£870,239	£4,862	£34,930	£221	4%
Westwood Farm Junior School	Primary	239	£1,078,954	£4,514	233	£1,112,765	£4,776	£33,812	£261	3%
Whitelands Park Primary School	Primary	367	£1,577,829	£4,299	393	£1,761,386	£4,482	£183,557	£183	12%
Woolhampton C.E. Primary School	Primary	102	£535,872	£5,254	100	£553,661	£5,537	£17,789	£283	3%
Yattendon C.E. Primary School	Primary	90	£484,050	£5,378	90	£520,362	£5,782	£36,312	£403	8%
Total formula funding			£119,766,579			£127,439,442		£7,672,863		
Block Transfer			£300,166			£0				
Total allocation			£120,066,745			£127,439,442				
Primary Total			£61,031,629			£64,168,777		£3,137,148		
Secondary Total		23160	£58,734,950		23313	£63,270,665		£4,535,716		

Equality Impact Assessment (EqIA) - Stage One

We need to ensure that our strategies, policies, 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 2010), 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 (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):

- Does the decision affect service users, employees or the wider community?
- 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 Schools' Forum to make:	Approve the school funding formula consultation to go out to all schools.
Name of Service/Directorate:	Finance and Property/Resources
Name of assessor:	Melanie Ellis
Date of assessment:	14.10.22

Is this a ?		Is this policy, strategy, function or service ... ?	
Policy	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	New or proposed	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Strategy	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Already exists and is being reviewed	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Function	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Is changing	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Service	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>		

(1) What are the main aims, objectives and intended outcomes of the proposed decision and who is likely to benefit from it?	
Aims:	To consult on the school funding formula 2023/24
Objectives:	To comply with Government guidance
Outcomes:	To use the responses to inform the decision
Benefits:	To comply with Government guidance

(2) Which groups might be affected and how? Is it positively or negatively and what sources of information have been used to determine this?			
<i>(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)</i>			
Group Affected	Potential Positive Impacts	Potential Negative Impacts	Evidence
Age	none	none	
Disability	none	none	
Gender Reassignment	none	none	
Marriage and Civil Partnership	none	none	
Pregnancy and	none	none	

Maternity			
Race	none	none	
Religion or Belief	none	none	
Sex	none	none	
Sexual Orientation	none	none	
Further Comments:			

(3) Result	
Are there any aspects of the proposed decision, including how it is delivered or accessed, that could contribute to inequality?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer: following government guidance on setting a school formula	
Will the proposed decision have an adverse impact upon the lives of people, including employees and service users?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer: the decision will impact school funding but only within certain parameters. The size of the funding will not change, only the distribution method. The consultation aims to consider the impact on all schools.	

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 EqIA 2.

If an EqIA 2 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 EqIA guidance and template – <http://intranet/index.aspx?articleid=32255>.

(4) Identify next steps as appropriate:	
EqIA Stage 2 required	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Owner of EqIA Stage Two:	
Timescale for EqIA Stage Two:	

Name: Melanie Ellis

Date: 14.11.22

Please now forward this completed form to Pamela Voss, Equality and Diversity Officer (pamela.voss@westberks.gov.uk), for publication on