



**Delegated Decisions by Cabinet Member for
Education
Tuesday, 17 January 2017**

ADDENDA

4. Formal Approval of School Funding Formula 2017-18 (Pages 1 - 4)

Members are asked to note the additional information attached.

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Summary of Factors included in Oxfordshire's Funding Formula 2017-18

Factor	Further Information	Provisional Primary Unit Value 2017-18	Provisional Secondary Unit Value 2017-18
Basic Entitlement - Primary	Reception uplift applied to funded pupils for Primary	£2,956.68	
Basic Entitlement – Secondary KS3	Funding allocated according to an age-weighted pupil unit (AWPU)		£4,234.81
Basic Entitlement – Secondary KS4			£4,438.24
Deprivation	Free School Meal eligibility %	£1,208.11	£2,012.86
Targeted Deprivation – IDACI Bands E&F		£0	£0
Targeted Deprivation – IDACI Band D	(Following the 2015 IDACI dataset update, the DfE have	£115.85	£126.88
Targeted Deprivation – IDACI Band C	redesigned the IDACI bands to return them to a similar	£231.70	£253.75
Targeted Deprivation – IDACI Band B	size to previous years for 2017-18 – Bands 1 to 6	£347.55	£380.63
Targeted Deprivation – IDACI Band A	become bands F to A)	£463.39	£507.50
Prior Attainment	Applied for primary pupils identified as not achieving the expected level of development within the early years foundation stage profile (EYFSP) and for secondary pupils not reaching L4 at KS2 in either English or maths. The EYFSP changed in 2013 and for pupils assessed using the old profile, funding continues to be targeted to those pupils who achieved fewer than 78 points. (The 2016 KS2 assessments are the first which assess the new national curriculum and a higher number of the year 7 cohort in the financial year 2017-18 will be identified as having low prior attainment. The DfE have used a national weighting to adjust the data so that it does not have a disproportionate influence within the overall total).	£821.41	£794.86
English as an Additional	Funding targeted at pupils	£265.57	£726.88

CMDED4

Language (EAL)	recorded as EAL for up to 2 years		
Pupil Mobility		£639.65	£0
Lump sum		£125,000	£125,000
Rates	Estimate based on prior year actual		
Split Sites	£30,000 per additional site if criteria met.	£30,000	£30,000
Exceptional Rents	Six schools eligible, where necessary rents exceed 1% of school budget and where this applies to less than 5% of all schools.	Estimate based on Prior year actual rent	

Notes: The above Basic Entitlement Unit values include the figures in the Proforma at Annex 1 of Paper 7 of the Schools Forum 12 January 2017 meeting, plus additional allocations for 2017-18 Schools Block DSG headroom reported at that meeting. Additional allocations which are subject to separate approval by the DfE, as part of the Minimum Funding Guarantee (MFG) Disapplication request process, have not been included in the Basic Entitlement Unit values above, at this stage. These additional allocations cannot be included in the Authority Proforma Tool for submission to the Education Funding Agency without receipt of formal approval from the DfE.

DRAFT MINUTE

Oxfordshire Schools Forum meeting - 12 January 2017 - DRAFT Minute of Item 7 discussion: Local Authority Pro-forma Tool

The template (Authority Proforma Tool - APT - Annex 1 of the Paper) for the schools funding formula model for 2017-18 is required to be submitted to the DfE by 20 January.

Forum had previously agreed the principles for finalising the funding formula at its meeting on 1 December 2016, to maintain the level of resources on all funding factors in the first instance. The LA confirmed it has been possible to do this with the funding received. Forum **endorsed** the unit rates for the formula shown at Annex 1 in the Paper, as the base position (noting that further checks are being undertaken at individual school level prior to submission).

Schools Forum also **agreed** the approach for allocating the balance remaining on the LA's 2017-18 DSG Schools Block, in line with previously agreed principles, noting that the net total headroom had now been evaluated at c£0.9M; this identified headroom should be applied to Basic Entitlement unit values. This headroom would currently amount to £9.35 per Primary pupil, £13.39 per KS3 pupil and £14.04 per KS4 pupil.

However, the LA indicated that a query had been raised with DfE relating to the calculation of the Minimum Funding Guarantee (MFG) in specific instances. This query has been discussed to attempt to find an agreed technical solution, but DfE has requested the LA submit a formal MFG disapplication request which requires Minister decision. Forum recorded its **approval** of the LA's disapplication request. Should the DfE agree to the disapplication request, this would allow the LA to increase the level of funding to schools which would mean an additional amount to the figures above of (per pupil) £3.22 for Primary, £4.61 for KS3 and £4.83 for KS4.

In addition, the School and Early Years Finance Regulations have not been issued so there are no current Regulations to underpin the Operational Guidance. Schools Forum recorded its dissatisfaction with the lateness, and non-receipt, of funding information from the DfE and that the Regulations were normally received a lot earlier. Forum members noted other examples of where DfE information had not been received in a timely way. It was **agreed** that, following the DfE's answer to the LA disapplication request, Cllr Harrod will write to the Secretary of State to voice Forum's views. It was also **agreed** that coordinated County action with regard to voicing views, particularly on schools funding, would be essential and further thought will be given to how best to do this, including briefing MPs.

It is noted that the LA is due to submit the APT to DfE by 20 January, following which every school should have their proformas published by 28 February, or before if possible and subject to the response to the MFG disapplication request.

Forum also noted that the LA is required to show Trade Union Facilities figures [in relation to de-delegation items](#), which had not yet been agreed by Forum (see Item 5) and are subject to ongoing work which will be put to Forum members outside formal meetings. [This was agreed in principle later on the agenda, with the precise figures to be finalised](#). This does not affect the LA submission although it will be incomplete when the data is [initially submitted](#), and so a note will be placed alongside to explain that these figures are awaited, and are not material as so low, and are only for Maintained Schools. The LA can then follow up with a resubmission.

Forum members commented on the difficulty of submitting 3-year budgets; OCC (**LBa**) will check the requirements with external auditors and pass on the necessary requirements through SF when issuing instructions for submission of budgets.

Forum thanked Officers for listening to, taking account of and responding so well to the difficulties being experienced by schools in putting this proforma together, which may mean a reduced cut in overall funding for the schools. **SF** will complete and submit the proforma.

(Following the above discussion, Forum felt able to vote on Paper 6 decision 2 under point 3.4, which decision is recorded under that Item).