

## Schools block funding factors

- The Schools Forum Briefing Group has met on 4 occasions in September and October 2012 to consider the range of factors to be included in the new Schools Block Funding Formula
- Several models have been reviewed to examine the range of factors included and their values and relative weightings
- School level illustrative allocations, based on January 2012 pupil census numbers and the 2012-13 DSG have been prepared for comparative analysis.
- Formula models and illustrative allocations have been distributed to all head teachers at phase meetings as well as an outline of the effect that the Minimum Funding Guarantee would have on actual school budget allocations
- Comments from head teacher phase meetings have been fed back to the Schools Forum Briefing Meeting to shape the successive modelling of the funding formula.
- Summary sheets showing the values and weightings for Draft Formula Model 1 and Draft Formula Model 2 are shown on the next two pages for illustrative purposes.

## Recommended funding factors

The Schools Forum Briefing Group recommends that the Kirklees Funding Formula for 2013-14 should include the following funding factors from the EFA dataset

- Deprivation (using the Free School Meals Ever 6 dataset)
- Deprivation (using the Income Deprivation Affecting Children Index (IDACI) dataset)
- Looked After Children
- Low prior attainment
- English as an Additional Language
- Pupil Mobility
  
- Lump sum
- Split site factor
- Business rates
- Private Finance Initiative
- Premises rentals
  
- The primary to secondary ratio per pupil should be adjusted to maintain the 2012-13 value of 1 to 1.2533

## Funding factor values and weightings

- Illustrative values and weightings (from the First and Second draft models) are attached.
- An updated version of these will be tabled at the Schools Forum meeting following further feedback from head teachers phase groups and consideration by the Schools Forum Briefing Group.
- The final recommended values and weightings will be agreed at the Schools Forum meeting in December, following further consultation and engagement with key stakeholders.

## NEW SCHOOLS BLOCK FUNDING FORMULA [FIRST DRAFT]

1 FACTOR PROPORTIONS	PRIMARY		SECONDARY		OVERALL	
	£	%	£	%	£	%
Age-Weighted Pupil Unit	100,472,544	71.81%	88,709,656	80.27%	189,182,200	75.54%
Free School Meals	4,839,778	3.46%	3,197,286	2.89%	8,037,064	3.21%
IDACI	4,961,875	3.55%	6,243,006	5.65%	11,204,881	4.47%
Looked-after Children	179,092	0.13%	115,121	0.10%	294,213	0.12%
Low Prior Attainment	11,379,606	8.13%	7,650,128	6.92%	19,029,734	7.60%
English as an Additional Language	447,681	0.32%	23,551	0.02%	471,232	0.19%
Pupil Mobility	0	0.00%	0	0.00%	0	0.00%
Lump sum	15,780,107	11.28%	2,898,387	2.62%	18,678,494	7.46%
Split sites	21,598	0.02%	38,115	0.03%	59,713	0.02%
Business Rates	1,732,261	1.24%	1,483,812	1.34%	3,216,073	1.28%
Private Finance Initiative	0	0.00%	84,930	0.08%	84,930	0.03%
Premises rentals	100,559	0.07%	75,580	0.07%	176,139	0.07%
	<b>139,915,101</b>	<b>100.00%</b>	<b>110,519,572</b>	<b>100.00%</b>	<b>250,434,673</b>	<b>100.00%</b>
Pupil numbers	34,669		22,543		57,212	
Total allocation expressed per pupil	4,035.74		4,902.61			
Primary/secondary ratio	<b>1</b>		<b>1.215</b>			

## 2 FACTOR VALUES

<b>Basic Entitlement:AWPU</b>	2,905.00		3,607.59	KS3
			4,453.30	KS4
<b>Additional Educational Needs:</b>				
Free School Meals	553.01		553.01	
IDACI (1)	104.90	[1]	298.51	[1]
IDACI (2)	104.90	[1]	298.51	[1]
IDACI (3)	209.79	[2]	597.02	[2]
IDACI (4)	419.58	[4]	895.53	[3]
IDACI (5)	839.17	[8]	1,194.04	[4]
IDACI (6)	1,258.75	[12]	1,791.07	[6]
Looked-after Children	1,500.00		1,500.00	
Low Prior Attainment	1,418.00		2,801.00	
English as an Additional Language	223.82		223.82	
<b>Maximum "additionality" range:</b>				
All factors (incl IDACI 1)	3,799.73		5,376.34	
All factors (incl IDACI 6)	4,953.58		6,868.90	

## 3 INTERNAL REBALANCE PRI:SEC

Age-Weighted Pupil Unit	98,542,323	71.42%	90,639,877	80.60%	189,182,200
Non-AWPU	39,442,557		21,809,916		61,252,473
<b>TOTAL</b>	<b>137,984,880</b>		<b>112,449,793</b>		<b>250,434,673</b>
Per pupil	3,980.07		4,988.24		<b>1.2533</b>
Revised AWPU	Primary	2,842.375696	KS3	3,672.147984	
			KS4	4,532.991998	

## NEW SCHOOLS BLOCK FUNDING FORMULA : 2ND DRAFT

1 FACTOR PROPORTIONS	PRIMARY		SECONDARY		OVERALL	
	£	%	£	%	£	%
Age-Weighted Pupil Unit	88,732,666	63.01%	81,075,976	73.97%	169,808,642	67.81%
Free School Meals	5,963,217	4.23%	3,939,460	3.59%	9,902,677	3.95%
IDACI	7,500,812	5.33%	7,639,979	6.97%	15,140,791	6.05%
Looked-after Children	179,092	0.13%	115,121	0.11%	294,213	0.12%
Low Prior Attainment	13,894,459	9.87%	11,149,008	10.17%	25,043,467	10.00%
English as an Additional Language	1,948,205	1.38%	102,489	0.09%	2,050,694	0.82%
Pupil Mobility	563,262	0.40%	195,578	0.18%	758,840	0.30%
Lump sum	20,190,107	14.34%	3,708,387	3.38%	23,898,494	9.54%
Split sites	21,598	0.02%	38,115	0.03%	59,713	0.02%
Business Rates	1,732,261	1.23%	1,483,812	1.35%	3,216,073	1.28%
Private Finance Initiative	0	0.00%	84,930	0.08%	84,930	0.03%
Premises rentals	100,559	0.07%	75,580	0.07%	176,139	0.07%
	<b>140,826,238</b>	<b>100.00%</b>	<b>109,608,435</b>	<b>100.00%</b>	<b>250,434,673</b>	<b>100.00%</b>

Pupil numbers	34,669	22,543	57,212
Total allocation expressed per pupil	4,062.02	4,862.19	
Primary/secondary ratio	<b>1</b>	<b>1.197</b>	

## 2 FACTOR VALUES

Basic Entitlement:AWPU	2,566.37	3,268.96 KS3
		4,114.67 KS4

## Additional Educational Needs:

Free School Meals	681.38	681.38
-------------------	--------	--------

IDACI (1)	157.78	[1]	288.17	[1]
IDACI (2)	347.11	[2.2]	389.03	[1.35]
IDACI (3)	426.00	[2.7]	936.56	[3.25]
IDACI (4)	631.11	[4]	1,008.60	[3.5]
IDACI (5)	631.11	[4]	1,152.69	[4]
IDACI (6)	631.11	[4]	1,152.69	[4]

Looked-after Children	1,500.00	1,500.00
-----------------------	----------	----------

Low Prior Attainment	1,731.37	4,082.02
----------------------	----------	----------

English as an Additional Language	974.00	974.00
-----------------------------------	--------	--------

Pupil Mobility	250.00	250.00
----------------	--------	--------

## Maximum "additionality" range:

All factors (incl IDACI 1)	5,294.53	7,775.57
All factors (incl IDACI 6)	5,767.86	8,640.09

## 3 INTERNAL REBALANCE PRI:SEC

Age-Weighted Pupil Unit	85,891,063	62.25%	83,917,579	74.63%	169,808,642
Non-AWPU	52,093,572		28,532,459		306,017,236
TOTAL	137,984,635		112,450,038		475,825,878
Per pupil	3,980.06		4,988.25		<b>1.2533</b>
Revised AWPU					
Primary	2,477.460065	KS3	3,399.803472		
		KS4	4,196.803070		