

# Kirklees Schools Forum

## 3<sup>rd</sup> March 2023

### ESFA Update on Funding Submission

#### 17<sup>th</sup> January 2023

[summary report template \(kirklees.gov.uk\)](https://www.kirklees.gov.uk)

Kirklees Cabinet - That approval be given to the submission of the schools funding formula to the ESFA for 2023-2024.

#### 18<sup>th</sup> January 2023

School Forum Item 7 - agreed that the School Funding Submission for 2023/24 can be submitted to the ESFA.

#### 19<sup>th</sup> January 2023

Authority Proforma Tool (APT) submitted via Galaxkey secure communication system.

#### 15<sup>th</sup> February 2023 (Half Term)

ESFA APT queries – response required by 16th February 2023

Confirmation that Safety Valve Block Transfer still outstanding

Four clarification questions:

- PFI factor for individual schools, should not change outside of 7-12%  
15 of the schools allocated funding through the PFI show a large increase when comparing to the values in the 2022-23 APT. The PFI factor should be for PFI affordability and not include such costs as energy, facilities management, catering etc. Please provide details of why the increases are above the RPIx.

**Response:** At the point when we calculated the APT the RPI indicator we used was 13.7% which was applied against the affordability gap in line with previous / historic calculations for PFI.

- That column Y on Local Factors is blank for all academies, and only shows values for LA Maintained schools whose Billing Authority are still using the historic payment process.  
In column Y of the Local factors if the billing authority remains on the previous mechanism for paying NNDR we would only expect values for LA maintained schools. We would not expect adjustments for any academy, If the billing authority is on the new mechanism we would not expect adjustments for any schools. Can you either justify the additional values, or remove them and resubmit the APT.

**Response:** Kirklees Council have adopted the new / revised process for NNDR – The column Y is blank and no adjustments have been entered in the APT.

- Confirm with the LA on which existing providers listed in the Inputs and Adjustments sheet as having a change in their pupil numbers should have those numbers guaranteed.  
Can you check & confirm that you are satisfied with the guaranteed number status for all schools shown in the Inputs & Adjustments tab, and that where pupil numbers should be guaranteed, that this is shown accurately in column BI.

Response: Satisfied

- Confirm with the LA that they are happy with any adjustments on the Recoupment tab for the two columns regarding growth payments and that all of the values shown in columns H & I are wholly regarding growth payments ONLY.  
Can you check and confirm that you are satisfied that no growth fund details are shown in columns H, I and J of the Recoupment worksheet.

Response: Satisfied

## **16<sup>th</sup> February 2023 (Half Term)**

ESFA accept responses to the queries submitted on 15<sup>th</sup> February 2023  
Reaffirmed Safety Valve Block Transfer still outstanding.

## **22<sup>nd</sup> February 2023**

Telephone call from ESFA, Andy Humphreys requesting that Kirklees Council submit a shadow APT effectively removing the £2.1m Block Transfer.

Response: Shadow APT submitted via Galaxkey moving £2.1m into Growth Fund.

## **28<sup>th</sup> February 2023**

Kirklees Council Safety Valve Block Transfer approved – Dan Tovey email confirmation.

Shadow APT no longer applicable.

Individual School Budget documentation derived from the 20232024 APT issued to all Maintained schools.

David Baxter  
Finance Manager  
1<sup>st</sup> March 2023