

Report for Schools Forum

Service Area:	Schools Finance
Presented By:	David Baxter
Report:	ESFA Authority Pro forma Tool (APT) Final Submission 2024/2025
Date:	1 st March 2024
Purpose Of Report:	To report and approve the APT submission to the ESFA for 2024/2025.
Is a Decision Required?	Yes

Kirklees Schools Forum - Public

1st March 2024

ESFA Authority Pro forma Tool (APT) Final Submission 2024/2025

1. Background information

1.1 The Education & Skills Funding Agency (ESFA) published both the final allocations for 2024/2025 and the Authority Pro Forma Tool model (APT) on **19th December 2023**. The APT is the process by which the funding allocations for the Schools Block are allocated ultimately to generate the individual school budgets for all mainstream schools in the Kirklees area.

2. Draft Stages of the Authority Pro-Forma Tool (APT) Completion

2.1 The APT has been considered by Schools forum in line with the standard timetabled process commencing with the initial the planning version of the 2024/2025 figures that was issued in July 2023. The process for 2024/2025 included a variation issued in October 2023 as the ESFA had to make urgent amendments to the funding process that effectively reduced the proposed funding allocations.

2.2 Schools Forum considered a report on the revised funding proposals for 2024/2025 on 13th October 2023. A resulting virtual engagement process allowed schools the opportunity to challenge the draft funding proposals for 2024/2025 with a key focus on the proposed £2.6 million (increasing from £2.1 million in 2023/2024) Schools Block to High Needs Block transfer to support the Safety Valve process. The block transfer is still to be formally approved by the Secretary of State through the disapplication process, which was submitted in November 2023.

2.3 Additional reports covering de-delegations (maintained schools) , growth fund (all schools), central schools and services block, CSSB (all schools) have all been considered as part of the annual challenge and review process.

2.4 All the initial planning work was based on the October 2022 census data, which is the key driver within the APT model. This is updated to reflect the October 2023 census data in the final published allocations.

3. Completion of the Final APT issued December 2023

3.1 The Final APT model issued on the 19th December 2023 for 2024/2025 aligns with the confirmed schools block funding including the updated census data that was completed in October 2023.

3.2 The APT model shows those elements considered by Schools Forum above with the final APT submission reflecting the following:

- The full £2.6 million (0.70%) block transfer (disapplication request submitted) to High Needs supporting the Safety Valve assumptions has been fully funded.

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- The minimum funding guarantee (MFG) will be set at 0.5%, which is in line with allowable range of 0% and 0.5%.
 - Premises 'lump sums' and split sites allocations have been increased to National Funding Formula (NFF) levels (previously modelled at minimum NFF levels) increasing allocations to all schools. Split site allocations have an impact on three schools.
 - The Growth Fund has been increased to £1.315 million (£1.2 million previously) which is closer to the National Funding Formula (NFF) assumption of £1.578 million and allows for a balanced APT.
 - De-delegations are applied at the rates agreed by Schools Forum.
 - All the key applicable National Funding Formula (NFF) rates have been applied in line with the guidance. Those highlighted in green in Appendix A denote the rates included within the APT.
- 3.3 The above components within the APT return are consistent with what has been agreed through the key stages of developing the 2024/2025 budget and ultimately results in a balanced DSG Schools Block budget for 2024/2025.
- 4. Recommendation**
- 4.1 Schools forum members are recommended to approve the final APT submission for the 2024/2025 financial year.

David Baxter
Finance Manager
27th February 2024

Factor	23-24 NFF including ACA	23-24 APT	Difference between 23-24 APT and 23-24 NFF	24-25 NFF including ACA	24-25 APT minimum	24-25 APT maximum
Primary basic entitlement	£3,394.54	£3,394.00	-£0.54	£3,562.61	£3,473.54	£3,651.67
KS3 basic entitlement	£4,785.77	£4,785.00	-£0.77	£5,022.85	£4,897.28	£5,148.43
KS4 basic entitlement	£5,393.86	£5,393.00	-£0.86	£5,661.96	£5,520.41	£5,803.51
Primary FSM	£480.08	£480.00	-£0.08	£490.08	£477.83	£502.34
Secondary FSM	£480.08	£480.00	-£0.08	£490.08	£477.83	£502.34
Primary FSM6	£705.11	£705.00	-£0.11	£820.14	£799.64	£840.64
Secondary FSM6	£1,030.16	£1,030.00	-£0.16	£1,200.20	£1,170.20	£1,230.21
Primary IDACI F	£230.04	£178.11	-£51.92	£235.04	£188.31	£240.92
Primary IDACI E	£280.04	£213.59	-£66.45	£285.05	£225.24	£292.17
Primary IDACI D	£440.07	£340.71	-£99.36	£445.08	£355.65	£456.20
Primary IDACI C	£480.08	£368.41	-£111.66	£485.08	£384.59	£497.21
Primary IDACI B	£510.08	£391.71	-£118.37	£515.09	£408.55	£527.96
Primary IDACI A	£670.11	£515.48	-£154.63	£680.12	£540.95	£697.12
Secondary IDACI F	£335.05	£257.73	-£77.32	£340.06	£270.47	£348.56
Secondary IDACI E	£445.07	£344.60	-£100.47	£450.08	£359.65	£461.33
Secondary IDACI D	£620.10	£478.56	-£141.54	£630.11	£502.72	£645.86
Secondary IDACI C	£680.11	£523.23	-£156.88	£690.12	£548.93	£707.37
Secondary IDACI B	£730.12	£562.07	-£168.05	£740.13	£588.88	£758.63
Secondary IDACI A	£930.15	£716.89	-£213.26	£945.16	£753.22	£968.79
Primary EAL	£580.09	£580.00	-£0.09	£590.10	£575.35	£604.85
Secondary EAL	£1,565.25	£1,565.00	-£0.25	£1,585.27	£1,545.64	£1,624.90
Primary LPA	£1,155.18	£1,155.00	-£0.18	£1,170.20	£1,140.94	£1,199.45
Secondary LPA	£1,750.28	£1,750.00	-£0.28	£1,775.30	£1,730.92	£1,819.68
Primary mobility	£945.15	£945.00	-£0.15	£960.16	£936.16	£984.17
Secondary mobility	£1,360.22	£1,360.00	-£0.22	£1,380.23	£1,345.73	£1,414.74
Primary lump sum	£128,020.48	£128,000.00	-£20.48	£134,422.85	£131,062.28	£137,783.42
Secondary lump sum	£128,020.48	£128,000.00	-£20.48	£134,422.85	£131,062.28	£137,783.42
Primary sparsity	£56,309.01	£56,300.00	-£9.01	£57,109.71	£55,681.96	£58,537.45
Secondary sparsity	£81,913.10	£81,900.00	-£13.10	£83,014.11	£80,938.76	£85,089.46
Middle-school sparsity	£81,913.10	£0.00	-£81,913.10	£83,014.11	£9,292.32	£85,089.46
All-through sparsity	£81,913.10	£0.00	-£81,913.10	£83,014.11	£9,292.32	£85,089.46
Split sites basic eligibility funding				£53,709.13	£52,366.40	£55,051.86
Split sites distance funding				£26,904.57	£26,231.96	£27,577.19
London fringe	1.0000	1.0000	0.0000	1.0000	1.0000	1.0000