

Appendix F: Comparison with other Local Authorities and AWPUs

- F1 Now that data on all other Local Authority's LFF has been published, it has been possible to compare the rates for factors used by Waltham Forest with all other Local Authorities but especially other London LAs and in particular our neighbouring LAs.
- F2 Table 1 below shows how Waltham Forest compares with all London LAs for factors within our Local Funding Formula for primary phase and Table 2 below shows the corresponding figures for secondary schools.

Table 1 – Primary Phase factor comparisons

Factor	WF	London Av	WF as % of London Av.
Lump sum	£125,000	£143,831	86.9%
AWPU	£3,240	£3,414	94.9%
FSM 6	£600	£1,209	49.6%
IDACI 4	£200	£354	56.5%
IDACI 5	£500	£457	109.4%
IDACI 6	£750	£748	100.3%
PA	£600	£1,046	57.4%
EAL	£600	£571	105.1%
Mobility	£750	£545	137.6%

Table 2 – Secondary Phase factor comparisons

Factor	WF	London Av	WF as % of London Av
Lump sum	£125,000	£143,831	86.9%
AWPU KS3	£4,850	£4,741	102.3%
AWPU KS4	£4,850	£5,119	94.7%
FSM 6	£1,200	£1,479	81.1%
IDACI 4	£400	£475	84.2%
IDACI 5	£1,000	£615	162.6%
IDACI 6	£1,500	£884	169.7%
PA	£800	£2,462	32.5%
EAL	£800	£1,436	55.7%
Mobility	£1,000	£913	109.5%

- F3 Funding comparisons are affected by the Schools Block GUF which is set individually for each LA and takes account of deprivation and cost of living. The London GUF average is **£5,425** but for our boundary LAs it is higher at **£5,491** which is some **4.25%** higher than the **£5,204** for Waltham Forest. So we would expect to see marginally higher rates in other Boroughs.
- F4 Overall, Waltham Forest allocates **74.3%** of funding through AWPU compared with **75.3%** for all London LAs.
- F5 It allocates **17.3%** on pupil related funding compared with **16.4%** for all London LAs which reflects the higher than average deprivation and AEN needs of our pupils which is not fully reflected in our Schools Block GUF since this is calculated using historic rather than current data; a factor which the proposed National Funding Formula from April 2015 would address.
- F6 However, on premises related costs it allocates **3.8%** compared with **1.6%** for all London LAs mainly because of PFI and rates (being the third highest in London).
- F7 Finally the lump sum accounts for **4.6%** against the London average of **6.5%** mainly because we have fewer primary schools per 1,000 of the primary school population.
- F8 However, the most striking comparison is the breakdown between primary and secondary funding which shows Waltham Forest to be a significant outlier. The average primary: secondary ratio across London is **1:1.307**. However, the Waltham Forest figure is **1:1.425** - the highest in London. The next highest is Ealing at **1:1.393**.
- F9 Waltham Forest is also an outlier when compared to all 150 Local Authorities. Local Authorities above 1:1.41 are: Halton 1:1.438; Knowlsey 1:1.528; Rotherham 1:1.421; Salford 1:1.467 and Telford & Wrekin 1:1.480. Thus Waltham Forest is the sixth highest in the country. This needs to be addressed on a phased basis as historic patterns of allocation cannot be justified in the longer term and the EFA will intervene.
- F10 The guidance from EFA is that "We are not, at this stage, prescribing constraints on the primary/secondary ratio but we have not ruled this out for future years and LAs should be aware of where they are in the range". The proposed introduction of a National Funding Formula from April 2015 would enable the EFA to introduce different funding rates for primary and secondary aged pupils and apply limits to the flexibility of LAs to set different rates.
- F11 Waltham Forest LA have stated in the past that we wish to reduce this funding gap by putting additional funding into primary schools and minimising the reduction for secondary schools.
- F12 The LA proposes that AWPU rates are further adjusted so that the primary: secondary ratio is reduced from **1:1.425** to at least **1: 1.410** as part of a phased move to bring the ratio closer to the London average of 1:1.307.
- F13 It is possible to improve the Primary:Secondary ratio since total expenditure on secondary phase schools will fall due to:
- lower forecasted NOR
 - ending of ICT contract and contract monitoring, and

- by allocating all the growth in Control Total funding to the primary phase.

- F14 However, this in itself does not cause a significant enough change and it is necessary to make a further reduction in secondary AWPU over and above that needed to meet the increased costs of Prior Attainment. In addition, because average delegated funding per pupil in Waltham Forest will fall from £5,109 in 2013-14 to £5,088 in 2014-15 – a reduction of £21 per pupil and this also needs to be reflected in the secondary AWPU. Therefore it is proposed to lower the secondary AWPU overall by £50 from £4,850 to £4,800. This still leaves it closer to the London average than the revised primary AWPU in Waltham Forest to the London average.
- F15 Unlike the primary AWPU where only one rate can be set, Local Authorities have the discretion to have separate secondary AWPU rates for KS3 and KS4 or have one rate. Waltham Forest chose a single rate which 13/32 London LAs also chose. The Task and Finish Group confirmed that Waltham Forest should retain a single rate.
- F16 The resultant effect of all the proposals and changes in NOR on Primary: Secondary ratio is set out in the Table 3 below.

Table 3: Change in primary: secondary ratio between 2013-14 and 2014-15

	2013-14			2014-15		
	NOR	Funding allocated	Funding per pupil	NOR	Funding allocated	Funding per pupil
Primary	22,584	£100.642m	£4,456	23,511	£105.135m	£4,472
Secondary	12,026	£76.373m	£6,350	11,924	£75.129m	£6,301
Ratio			1: 1.425			1: 1.409

- F17 Thus on average funding per pupil for primary phase pupils would rise by **£16 (or 0.36%)**; average funding per pupil for secondary phase pupils would fall by **£49 (or 0.77%)**.