

# Equality Impact Assessment Template

Please complete this template using the [Equality Impact Assessment Guidance document](#)

**Version 3: January 2013**

Title of proposal <i>(include forward plan reference if available)</i>	School Funding Formula 2019/20
Directorate and Service Area	Children Services
Name and title of Lead Officer completing this EIA	Rosemarie Kerr, Principal Accountant - Schools, Strategic Schools Finance Unit
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Names and titles of other officers involved in completing this EIA	N/A
Partners involved with the EIA where jointly completed	N/A
Date EIA completed	22nd November 2018
Date EIA signed off or agreed by Director or Executive Director	
Name of Director or Executive Director signing off EIA	
Date EIA considered by Cabinet Member	

**See [Equality Impact Assessment Guidance](#) for key prompts that must be addressed for all questions**

**1. The purpose of the proposal or decision required  
(Please provide as much information as possible)**

This report sets out the proposed school funding formula for Sandwell for 2019/20 as required by the Department of Education.

**2. Evidence used/considered**

Sandwell has used “2019/20 Schools Revenue Funding: Operational guidance for local authorities” issued in July 2018, where additional guidance was issued in September and October 2018.

SMBC will use the responses received from the consultation with schools and other stakeholders on the changes to the formula which will be reported to the Schools Forum and their final decisions reflected in the final report.

**3. Consultation**

The authority have consulted with School Governing Bodies and the following stakeholders:

- Joint Union Panel
- Association Sandwell Governing Bodies (ASGB)
- Joint Executive Group
- Secondary Head teacher Partnership
- Primary Head teacher Partnership

**4. Assess likely impact**

Please give an outline of the overall impact if possible.

The proposals included within this report will not have a differential impact on any particular group of people or sectors of the community. The proposed school funding formula has been developed in line with DfE requirements and the national policy has been subject to an EIA.

**Please complete the table below at 4a to identify the likely impact on specific protected characteristics**

#### 4a. Use the table to show:

- Where you think that the strategy, project or policy could have a negative impact on any of the equality strands (protected characteristics), that is it could disadvantage them or if there is no impact, please note the evidence and/or reasons for this.
- Where you think that the strategy, project or policy could have a positive impact on any of the groups or contribute to promoting equality, equal opportunities or improving relationships within equality characteristics.

Protected Characteristic	Positive Impact	Negative Impact	No Impact	Reason and evidence (Provide details of specific groups affected even for no impact and where negative impact has been identified what mitigating actions can we take?)
	✓	✓	✓	
Age			✓	The school funding factors differentiates between a primary and secondary school aged child in the rate applied to the factor, This primary: secondary ratio of 1:1.23 has been in existence for many years and the school funding formula for 2019/20 has funding formula options to increase the ratio for secondary age pupils either to 1:1.25 or to the national average ratio of 1:1.31 it the authority were to adopt the National Funding Formula Factor values and also so that it better reflects the ratio's adopted by SMBC's statistical neighbours.

<b>Disability</b>			✓	The school funding in this report deals specifically with the schools block element of the Dedicated Schools Grant (DSG). The DSG is made up of 4 Blocks of funding; Schools, High Needs, and Early Year and Central Schools Services Block. If a pupil is identified as having special educational needs and meets the minimum threshold criteria then this element of the funding comes through the High Needs block of the DSG.
<b>Gender reassignment</b>			✓	This report recommends the factor rates, contingencies, caps and notes the de-delegated and education functions budgets for the schools formula funding for 2019/20. It does not recommend any other changes.
<b>Marriage and civil partnership</b>			✓	This report recommends the factor rates, contingencies, caps and notes the de-delegated and education functions budgets for the schools formula funding for 2019/20. It does not recommend any other changes.
<b>Pregnancy and maternity</b>			✓	This report recommends the factor rates, contingencies, caps and notes the de-delegated and education functions budgets for the schools formula funding for 2019/20. It does not recommend any other changes.
<b>Race</b>			✓	This report recommends the factor rates, contingencies, caps and notes the de-delegated and education functions budgets for the schools formula funding for 2019/20. It does not recommend any other changes.
<b>Religion or belief</b>			✓	This report recommends the factor rates, contingencies, caps and notes the de-delegated and education functions budgets for the schools formula funding for 2019/20. It does not recommend any other changes.
<b>Sex</b>			✓	This report recommends the factor rates, contingencies, caps and notes the de-delegated and education functions budgets for the schools formula funding for 2019/20. It does not recommend any other changes.

<b>Sexual orientation</b>			✓	This report recommends the factor rates, contingencies, caps and notes the de-delegated and education functions budgets for the schools formula funding for 2019/20. It does not recommend any other changes.
<b>Other</b>			✓	This report recommends the factor rates, contingencies, caps and notes the de-delegated and education functions budgets for the schools formula funding for 2019/20. It does not recommend any other changes.

Does this EIA require a full impact assessment? Yes  No

If there are no adverse impacts or any issues of concern or you can adequately explain or justify them, then you do not need to go any further. You have completed the screening stage. You must, however, complete sections 7 and 9 and publish the EIA as it stands.

If you have answered yes to the above, please complete the questions below referring to the guidance document.

**5. What actions can be taken to mitigate any adverse impacts?**

**6. As a result of the EIA what decision or actions are being proposed in relation to the original proposals?**

**7. Monitoring arrangements**

- The schools submit termly monitoring and this is reported to Quality and Standards Programme Executive board (QUSPE).
- Schools end of year balances are reported to Schools Forum and QUSPE.
- Schools funding formula is consulted on and a report submitted to the Schools Forum on an annual basis for their recommendation to Cabinet.

## **8. Action planning**

You may wish to use the action plan template below



Question no. (ref)	Action required	Lead officer/ person responsible	Target date	Progress

**9. Publish the EIA**

## **Where can I get additional information, advice and guidance?**

In the first instance, please consult the accompanying guide “Equality Impact Assessment Guidance”

### **Practical advice, guidance and support**

Help and advice on undertaking an EIA, using the electronic EIA toolkit or receiving training related to equalities legislation and EIAs is available to **all managers** across the council from officers within Improvement and Efficiency. The officers within in Improvement and Efficiency will also provide overview quality assurance checks on completed EIA documents.

**Please contact:**

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