

SCHOOLS FORUM AGENDA ITEM

For Action

For Information

Brief Description of Item

This report provides an update for the Schools Forum on the application in the 2023/24 financial year of the Schools Block Falling Rolls Fund for mainstream primary phase-maintained schools and mainstream primary phase academies.

Date (s) of any Previous Discussion at the Forum

Allocations from 2022/23 Falling Rolls Fund were considered by the Schools Forum on 8 March 2023. Allocations from the 2023/24 Fund have not yet been considered.

Background / Context

The establishment of a Falling Rolls Fund within the Schools Block, for the primary phase, came out of the Forum's consideration of the impact of 'under-subscription' in primary schools and primary academies. A key report was presented to the Forum on 19 September 2018 (Document JE). This report provides useful background.

Within its discussions, the Forum stressed the importance of resolving these situations as far as possible through Published Admission Number (PAN) adjustments, rather than via on-going financial support. The Authority is actively engaged in PAN management. The Forum did also consider how direct financial support could be provided from the DSG. The Falling Rolls Fund is the mechanism through which support can be provided to both maintained schools and academies and both are required to contribute to the cost of the Fund. This is the only route through which financial support can be provided locally from Bradford's DSG to under-subscribed academies.

A Falling Rolls Fund, with a value of £250,000, was established for the primary phase for the first time for the 2019/20 financial year. A report was presented to the Schools Forum on 11 March 2020. No maintained schools or academies qualified for funding. The £250,000 was rolled forward and added to by a further £250,000 allocated from the 2020/21 Schools Block. No maintained schools or academies have qualified for funding in 2020/21, 2021/22 or in 2022/23. To date, therefore, there has been no spend. The Schools Forum agreed not to allocate any further funding for the Falling Rolls Fund from in-year Schools Block allocations after 2020/21. Therefore, the current value of available funding that is continued within the Schools Block brought forward balance is £500,000.

Our Falling Rolls Fund mechanism and criteria that are applied for the 2023/24 financial year are presented at Appendix 1, for reference.

In initially establishing a Falling Rolls Fund for the primary phase in 2019/20, we identified that its value will be quite limited. This is because the DfE has set strict eligibility criteria. The Fund's purpose in 2023/24 is to protect good and outstanding schools and academies against short term 'blips' in pupil numbers. One of the restrictions is the mandatory requirement that only good or outstanding schools are eligible for funding. This restriction will be removed for the 2024/25 Fund. However, the most significant restriction is the requirement that funding can only be allocated where under-subscription is demonstrably a short-term 'blip' and is not the result of a longer-term change in demographics. This 'blips' restriction will still be in place for the 2024/25 Fund. It is this restriction that has so far resulted in schools and academies in Bradford being ineligible for Falling Rolls Funding.

It is helpful to remind the Forum, for reference, of the most recent position, presented on 8 March 202., and how the DfE's restrictions reduced the eligibility of schools and academies for support from the Fund in 2022/23:

- There were 34 primary schools and primary academies (out of 160) that had a number on roll at October 2021 that was not at least 90% of their Published Admission Number (PAN) capacity. This is trigger 2. The occupancy of 14 of these were between 85% and 89%; 14 were between 70% and 84%; 6 were lower than 70%.
- For all 34 however, the latest forecasted pupil intake data clearly indicated that their surplus capacity will not be needed within the next 3 years. This is trigger 4. Many of these 34 were also ineligible as a result of other triggers. A number of the 34 have already consulted, or were consulting at the time, on PAN reductions.

Details of the Item for Consideration

We are now applying the criteria, as set out in Appendix 1, to determine eligible schools and academies and the values of funding to be allocated for the 2023/24 financial year.

The position for 2023/24, as set out below, is calculated on the Authority's latest available pupil numbers forecast. This forecast confirms the expected continued reduction in pupil numbers across the primary phase. The forecast serves to reinforce that our Falling Rolls Fund at this time has limited value.

- As was the case in each of the last 4 years, no maintained schools or academies qualify for funding from the 2023/24 Falling Rolls Fund.
- There are 36 primary schools and primary academies (out of 160) that had a number on roll at October 2022 that was not at least 90% of their Published Admission Number (PAN) capacity. This is trigger 2. The occupancy of 17 of these were between 85% and 89%; 15 were between 70% and 84%; 4 were lower than 70%.
- For all 36, the latest forecasted pupil intake data clearly indicates that their surplus capacity will not be needed within the next 3 years. This is trigger 4. Many of these 36 are also ineligible as a result of other triggers. 17 are ineligible as a result of trigger 1 (year on year reduction of >3%). A number of the 36 have already consulted, or are currently consulting, on PAN reductions.

On this basis, the Forum is asked to note that the ring-fenced sum of £500,000 is unspent within the Schools Block and that this amount is carried forward to 2024/25, as agreed at the January 2024 Forum meeting.

The Forum may wish to consider this outcome and the calculations in more detail. If it does, we would suggest that the Forum's sub-group is re-convened.

Implications for the Dedicated Schools Grant (DSG) (if any)

There is £0.500m of ring-fenced Falling Roll Fund monies held within the Schools Block brought forward balance. With no allocation from the Falling Roll Fund in 2023/24, this £0.500m will be fully carried forward into 2023/24 for use initially against the 2024/25 Falling Rolls Fund, which will be presented to the Schools Forum in March 2025.

Recommendations

Recommended –

- (1) The Schools Forum is asked to note that there are no allocations to be made from the Schools Block Falling Rolls Fund in 2023/24.**
- (2) The Forum is asked to note that the sum of £0.500m is unspent within the Schools Block and is carried forward into 2024/25 as a ring-fenced sum.**

List of Supporting Appendices / Papers

Appendix 1 – Falling Rolls Fund 2023/24

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