

Schools Forum
Wednesday, 6 July 2022 at 8.00 am
VENUE: Council Chamber, City Hall, Bradford

PLEASE NOTE

All meetings will be held in public; the agenda, decision list and minutes will be publicly available on the Council's website and Committee Secretariat, Room 112, City Hall, Bradford.

The taking of photographs, filming and sound recording of the meeting is allowed except if Councillors vote to exclude the public to discuss confidential matters covered by Schedule 12A of the Local Government Act 1972. Recording activity should be respectful to the conduct of the meeting and behaviour that disrupts the meeting (such as oral commentary) will not be permitted. Anyone attending the meeting who wishes to record or film the meeting's proceedings is advised to liaise with the Forum Clerk Asad Shah who will provide guidance and ensure that any necessary arrangements are in place. Those present who are invited to make spoken contributions should be aware that they may be filmed or sound recorded

1. APOLOGIES FOR ABSENCE

The City Solicitor will report the names of alternate Members who are attending the meeting in place of appointed Members.

2. DISCLOSURES OF INTEREST

To receive disclosures of interests from Members on matters to be considered at the meeting. The disclosure must include the nature of the interest.

An interest must also be disclosed in the meeting when it only becomes apparent to the member during the meeting.

3. MINUTES OF 18 MAY 2022 & MATTERS ARISING

1 - 8

That the minutes of the meeting held on 18 May 2022 be signed as a correct record.

4. MATTERS RAISED BY SCHOOLS

Members will be asked to consider any issues raised by schools.

5. **STANDING ITEM - DSG SCHOOLS BLOCK GROWTH FUND ALLOCATIONS (a)**

There are no allocations for consideration at this meeting.

6. **SCHOOLS FORUM MEMBERSHIP – UPDATE (i)**

9 - 12

The Business Advisor (Schools) will present a report, **Document ON**, which provides an update on the Forum's membership, continuing from the report (Document OI) that was presented on 18 May 2022.

Recommended –

The Schools Forum is asked to consider and to note the information provided.

(Andrew Redding – 01274 432678)

7. **DEDICATED SCHOOLS GRANT OUTTURN (BALANCES) 2021/22 (i)**

13 - 18

The Business Advisor (Schools) will present a report, **Document OO**, which provides the initial confirmation of carry forward balances held within the Dedicated Schools Grant at the close of the 2021/22 financial year.

Recommended –

The Schools Forum is asked to note the information provided.

(Andrew Redding – 01274 432678)

8. **SCHOOLS BLOCK 'HARD' NATIONAL FUNDING FORMULA CONSULTATION (i)**

19 - 24

The Principal Finance Officer (Schools) will present a report, **Document OP**, which provides a briefing on the DfE's latest consultation on the transition to the 'hard' National Funding Formula in the Schools Block, which was published on 7 June 2022. The deadline for responses to this consultation is 9 September 2022.

Recommended -

(1) The Schools Forum is asked to note the information presented.

(2) The Schools Forum is asked to consider the key points of feedback that the Forum wishes the Local Authority to

include in its response to the DfE's latest consultation on the 'hard' National Funding Formula.

(Jonty Holden – 01274 431927)

9. FORMULA FUNDING DEVELOPMENT 2023/24 (i)

25 - 30

The Business Advisor (Schools) and the Principal Finance Officer (Schools) will present a report, **Document OQ**, which provides an overview of local formula funding review priorities for the 2023/24 financial year across the Schools Block, the Early Years Block and the High Needs Block.

Recommended –

- (1) The Schools Forum is asked to consider and to note the information provided.**
- (2) Forum Members are asked to note that the Early Years Working Group will be convened early in the autumn term to begin to more closely consider the Early Years Single Funding Formula for the 2023/24 financial year.**
- (3) Forum Members are invited to (remotely) attend a 'Formula Funding Working Group' session, on Tuesday 27 September (8am) or Wednesday 28 September (8am) or Tuesday 4 October (8am). As in previous years, these sessions will enable Forum Members to consider in more detail the impact of national formula funding decisions and to explore and guide the proposals for 2023/24 for Bradford's Schools and High Needs Block formula funding arrangements that are anticipated will be set out for consultation in October.**

(Jonty Holden – 01274 431927)

(Andrew Redding – 01274 432678)

10. UPDATE ON THE HIGH NEEDS BLOCK (i)

31 - 34

The Assistant Director, SEND and Inclusion, the Strategic Manager, Intelligence and Sufficiency, and the Business Advisor (Schools) will present a report, **Document OR**, which provides an update on High Needs Block matters, including the development of the plan for the High Needs Block surplus balance and the development of new additional specialist places.

Recommended –

The Schools Forum is asked to consider and to note the information provided.

(Niall Devlin – 01274 431356)
(Emma Hamer – 01274 439535)

11. **SCHOOLS FORUM STANDING ITEMS (i)**

Updates on the following Forum standing items will be provided verbally where these have not been covered within other agenda items:

Schools Forum membership

- Update from the High Needs Block Steering Group
- Update from the Schools Financial Performance Group (SFPG)
- Update on School / Academy Budgets
- Update from the Early Years Working Group (EYWG)
- Update from the Formula Funding Working Group (FFWG)
- Update on Primary School Places
- Update on Academies & Free Schools

The Forum is asked to note the information provided.

(Andrew Redding – 01274 432678)

12. **AOB / FUTURE AGENDA ITEMS**

Members will be asked for any additional items of business, for consideration at a future meeting.

13. **DATE OF NEXT MEETING**

The next Forum meeting is planned for Wednesday 14 September 2022.

Please note that the planned dates of meetings for the 2022/23 academic year in full are as follows:

- Wednesday 14 September 2022, 8am
- Wednesday 12 October 2022, 8am
- Wednesday 7 December 2022, 8am
- Wednesday 11 January 2023, 8am
- Wednesday 18 January 2023, 8am PROVISIONAL MEETING
- Wednesday 8 March 2023, 8am
- Wednesday 17 May 2023, 8am
- Wednesday 5 July 2023, 8am

(a) Denotes an item for action (including where a formal view or recommendation is required).

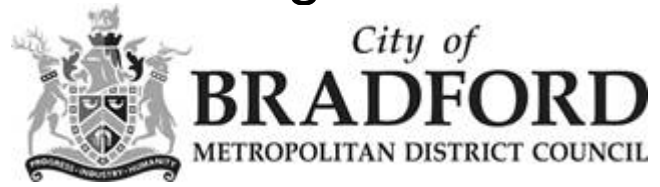
(i) Denotes an item for information.

Signposting of High Needs Information

- As per the schedule presented on 14 October 2020, “Forum members are expected to access ‘outside of the Forum meetings’ wider SEND information that is presented to other groups and that is already published, including information presented to the SEND Partnership. The Authority will signpost this information (webpage links) for Forum members at the bottom of agendas.”

- SEND Partnership Board (minutes of meetings):
<https://localoffer.bradford.gov.uk/coproduction--feedback/send-strategic-partnership-board->

This page is intentionally left blank



Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 6 July 2022

Schools Forum meeting held remotely on Wednesday 18 May 2022

To view the archived recording of this meeting, please see here:
<https://bradford.public-i.tv/core/portal/home>

Commenced 08:05
Concluded 10:20

RECORD OF MEETING ATTENDEES, APOLOGIES AND ABSENCES

Schools & Academies Members

IN ATTENDANCE

Member	Membership Group
Dianne Richardson (Chair)	Maintained Primary Schools - Headteacher
Ian Morrel (Vice Chair)	Maintained Secondary Schools – Headteacher
Brent Fitzpatrick OBE	Academies Member
Melanie Saville	Academies Member
Helen Williams	Academies Member
Mathew Atkinson	Academies Member
Dominic Wall	Academies Member – Special School Academies
Bev George	Maintained Nursery Schools – Governor
Sian Hudson	Maintained Nursery Schools – Headteacher
Kathryn Swales	Maintained Primary Schools - Headteacher
Graham Swinbourne	Maintained Primary Schools - Headteacher
Lyndsey Brown	Maintained Special Schools - Headteacher
Kirsty Ratcliffe	Pupil Referral Unit (maintained)

APOLOGIES RECEIVED

Member	Membership Group
Ashley Reed	Academies Member
Michael Thorp	Academies Member
Victoria Birch	Academies Member
Carol Dewhirst OBE	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Emma Hamer	Maintained Primary Schools – Governor
Nicky Kilvington	Maintained Primary Schools - Headteacher

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Andrew Morley	Academies Member

Deborah Howarth	Academies Member
Heather Lacey	Academies Member
Sir Nick Weller	Academies Member
Wahid Zaman	Academies Member

Non-Schools Members

IN ATTENDANCE

Member	Membership Group
David Johnston	Officer Representing Vulnerable Children
Tom Bright	Teaching Unions

APOLOGIES RECEIVED

Member	Membership Group

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Junaid Karim	Council for Mosques (Bradford)
Gillian Simpson-Morris	Representative of Early Years PVI Members

Substitute Members present at the meeting as a Member (not as an Observer)

Substitute Member	Membership Group

Substitute Members present at the meeting as an Observer (not as a Member)

Substitute Member	Membership Group
Alison Kaye	Academies Member
Michelle Farr	Academies Member – Special School Academies

Local Authority Officers present at the meeting

Officer	Position
Niall Devlin	Assistant Director, SEND and Inclusion
Raj Singh	Business Advisor
Andrew Redding	Business Advisor (Schools)
Asad Shah	Committee Secretariat
Marium Haque	Deputy Director, Education and Learning
Dawn Haigh	Principal Finance Officer (Schools)
Jonty Holden	Principal Finance Officer (Schools)

40% of the School Forum's membership (filled membership positions) must be present for a meeting to be quorate. This meeting was quorate, with 45% of members present (13 out of 29 currently filled membership positions).

618. DISCLOSURES OF INTEREST

Ian Morrel declared interests for agenda items 7, 9 and 10.

619. MINUTES OF 9 MARCH 2022 & MATTERS ARISING

The Business Advisor (Schools) reported on progress made on “Action” items from the 12 January meeting. He reported that:

- The minutes do not record any formal resolutions with items “for action”. However, they do record themes for further discussion, which come back to the Forum within reports to this meeting. This includes the High Needs Block working group (discussing the surplus balance).
- Regarding Item 614, and the request for an impact evaluation of the School Improvement Monitoring and Brokering Grant (SIMB), the Business Advisor is seeking this from the Assistant Director, School Improvement.
- Regarding Item 613, the Assistant Director, SEND and Inclusion, responded to the questions and comments that the Forum asked at the March meeting relating to the 2020/21 Exclusions Report, as recorded in the minutes. He provided some further information on how formula funding, and Pupil Premium Grant, is adjusted following permanent exclusion. He also advised that both Bradford Alternative Provision Academy and Park Aspire offer a small number of ‘step out’ places, for schools to commission directly with these settings. In response, the Chair advised that a member had asked at the March meeting for clarity on how these places can be accessed. The Chair suggested this matter will be included in discussions under agenda items 8 and 9. The Vice Chair agreed, adding that discussions should focus on a necessary review, which he has previously argued for, looking at how ‘step out’ (prevention places) provision is linked to the availability / sufficiency of funding, in that the net cost of such provision on schools is currently quite prohibitive. Within this review, the strategic impact of weighting such provision and funding for early intervention, in the primary-phase, must also be evaluated.

The Business Advisor reported on other matters arising:

- Scheme for Financing Schools April 2022: There were no directed revisions to the Scheme for April 2022 and therefore, our Scheme for maintained schools remains unchanged, except for a minor adjustment to the remove reference to the Salix Loan scheme (which has ceased). The formal adoption of the IRFS 16 reporting standard for leases by maintained schools has now been postponed until April 2024. Guidance is to be provided however, on how authorities can adopt the standard earlier than this.

Resolved –

- (1) That progress made on “Action” items and Matters Arising be noted.**
- (2) That the minutes of the meeting held on 9 March 2022 be signed as a correct record.**

620. MATTERS RAISED BY SCHOOLS

No matters were raised and no resolutions were passed on this item.

621. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS

No allocations for 2022/23 were presented and no resolutions were passed on this item.

622. SCHOOLS FORUM MEMBERSHIP

The Business Advisor (Schools) presented, **Document OI**, which provided an update on the Forum's membership and composition and how the Local Authority will seek to refresh the Forum's membership for the 2022/23 academic year. Members were asked to approve the proposed approach to the election of the Chair and Vice Chair of the Schools Forum. Members were also asked to comment on, and approve, the Forum's Conduct of Meeting and Procedures document for 2022/23 (Appendix 2).

The Academies member, representing Special School Academies, confirmed that Michelle Farr has been elected to replace him as representative.

Forum members did not have any further comments on this report and did not ask any questions.

Resolved –

(1) That the information presented in Document OI be noted.

(2) That the proposed approach to the election of the Chair and Vice Chair of the Schools Forum for the 2022/23 academic year be approved.

(3) That Appendix 2 (Forum Conduct of Meetings and Procedures) for the 2022/23 academic year be approved.

LEAD: Business Advisor, Schools

623. UPDATE ON THE SCHOOLS BLOCK 'HARD' NATIONAL FUNDING FORMULA

The Principal Officer (Schools) presented the report, **Document OJ**, which provided an update on the DfE's published response to the consultation on the completion of the 'hard' National Funding Formula reforms, with changes to be implemented for the 2023/24 financial year.

Forum members did not have any comments on this report and did not ask any questions.

Resolved – That the information presented in Document OJ be noted.

LEAD: *Principal Finance Officer, Schools*

624. MAINTAINED SCHOOLS' OUTTURN (REVENUE BALANCES) 2021/22

The Business Advisor (Schools) presented a report, **Document OK**, which provided an overview of the position of revenue balances held by maintained schools at 31 March 2022.

Forum members did not have any comments on this report and did not ask any questions.

Resolved – That the information presented in Document OK be noted.

LEAD: *Business Advisor, Schools*

625. NATIONAL SEND AND ALTERNATIVE PROVISION REVIEW & CAPITAL SETTLEMENTS

The Business Advisor (Schools), together with the Assistant Director, SEND and Inclusion, presented **Document OL**, which provided an overview of the DfE's SEND and Alternative Provision Review, which was published on 29 March, as well as the Basic Needs and SEND capital settlements for 2022-2024.

In the discussion that followed the presentation of the report, Forum members made the following comments and asked the following questions:

- The member representing Academy Special Schools expressed his concern that Bradford may be excluded from the next wave of SEND free school applications, because we are not currently in deficit. He stated that new school provision is the essential way that high quality holistic learning environments are created. We therefore, need to push back to Government very strongly on this. This was echoed by the Chair, who asked whether the Forum can do anything to raise this issue with the DfE. The Assistant Director, SEND and Inclusion, stated that the Authority is committed to all options for the development of specialist places, including free schools, and that the Authority has already raised our concern with the DfE and ESFA regarding our possible exclusion from the free school wave.
- The member representing Academy Special Schools stated that the SEND Review is incredibly ambitious and, if successful, could change the SEND and AP landscape. There is strong theme in the Review of ensuring, without legislation, that health agencies pay for the health and therapy support services they are responsible for, irrespective of where these services are needed / delivered. If this theme is delivered in full, this will end how schools are currently subsidising the cost of health and therapy services. Locally, we need to start this transition now. The Strategic Director, Children's Services, responded that the Authority is in discussion with health colleagues (ICS systems lead), especially in the context of the creation of specialist places.
- The Assistant Director explained that the DfE's 'solutions', that are expressed within the SEND Review document are: increased standardisation (vs. local

discretion); the re-invention of 'early intervention'; increased partnership; workforce development; increased parental confidence; greater collaboration / co-ordination between SEND and Alternative Provision; return to mainstream inclusion. He emphasised that change in cost is a clear implication of these solutions, especially in the short term, where authorities will be required to invest in early intervention strategies at the same time as meeting the cost of the needs of existing children and young people. These solutions could also mean significant change in costs for schools and for other providers.

- The Vice Chair expressed his view that there is contradiction within the DfE's Schools White Paper, between encouraging innovation and independence, and increasing centralisation and standardisation. He asked whether and how the Authority could be impeded by this. He also asked whether developments in Bradford, including the establishment of the Children's Services Company, provide the opportunity to look at support service delivery innovatively, for example, via the pooling of budgets and staffing resources, the location of health services hubs, the distribution of children's social workers. The Assistant Director responding that the Authority is required to work within a regulatory framework, but he agreed that we need to seek to exhaust the creatively in the system and to work in partnership. This includes the re-design of services. Regarding the movement towards greater standardisation, we need to voice clearly in our response to the DfE's consultation that no child or young person should be 'worse off' as a result of changes, including possible changes in funding levels that may come from the development of a national top-up banding system.
- The member representing the teaching trades unions asked for some further statistics on our numbers of placements in independent provisions. The Chair advised that this information is included in the SEND statements that were been presented to the Forum in December and in March. The Strategic Director added that, although the number of placements has increased in recent years (and therefore, cost has increased), these placements as a % of our schools' population has remain static.

Resolved –

(1) That the information presented in Document OL be noted.

(2) That a letter is sent from the Chair to the Secretary of State to express the Forum's concern regarding the potential exclusion of Bradford from the new SEND free schools wave (on the grounds that our DSG account is not currently in deficit).

LEAD: *Business Advisor, Schools*

626 HIGH NEEDS BLOCK SURPLUS BALANCE DISCUSSION UPDATE

Linking with the previous agenda item on the SEND and Alternative Provision Review, the Business Advisor (Schools) presented a report, **Document OM**, which provided an update on the consideration of the surplus balance that is held within the High Needs Block at the end of the 2021/22 financial year. The report explained the discussions that have taken place with the Forum's Working Group, as well as with the Education and Skills Funding Agency (ESFA), since the last

Schools Forum meeting.

In the discussion that followed the presentation of the report, Forum members made the following comments and asked the following questions:

- A member representing Maintained Primary School Headteachers expressed his disappointment that monies from the surplus balance have not been / are not being injected into schools quickly. He stated that there should be a 4th strand of allocation, with funds being quickly allocated to support children with needs in schools now. The Business Advisor responded that the rationale for the approach that is set out in the report, in the Authority's view, is very clear. This rationale covers the retention of the majority of funds, the targeting of funds to 3 main priority areas, and the Authority's view about not progressing the allocation of funds into schools now in order to further enhance top-up and element 2 funding. The member responded that a 4th strand of allocation would be targeted to support children with needs in schools now.
- The Chair responded to express her frustration, regarding the sufficiency of SEND places, and that a strategic plan for the use of a proportion of the balance towards the 3 identified areas is not yet in place. The Vice Chair added that the Forum members that have attended the working group share a frustration, but there needs to be a clear strategic plan, which is going to take a little more time to develop as it is important to get this right.

Following some discussion on next steps, the timing of the plan, and whether the Forum's working group will meet again, the Forum requested that the Authority presents a plan for the use of the balance (towards the 3 identified areas) to the 6 July meeting, with the working group given the opportunity to meet to contribute to / discuss the plan (including in draft) before this meeting.

The Assistant Director explained that the Authority will seek to respond to this request, but that timescales are short. He emphasised that some of this work is also conditional on receiving advice from the ESFA on the use of High Needs Block funds.

Resolved –

(1) That the information presented in Document OM be noted.

(2) That the Authority presents a plan for the HNB surplus balance to the Forum at the 6 July meeting, with the Forum's sub group to meet in advance of this.

LEAD: Assistant Director, SEND and Inclusion

SCHOOLS FORUM STANDING ITEMS

627.

No further information was presented and no resolutions were passed on this item.

628. AOB / FUTURE AGENDA ITEMS

A member asked whether anything has been announced regarding additional funding to support schools with rising energy costs. The Business Advisor (Schools) responded to advise that, although the DfE has indicated that it is looking at this issue, no announcements have yet been made.

629. DATE OF NEXT MEETING

The next scheduled is Wednesday 6 July. This will be an 'in-person' meeting held at City Hall.

The provisional dates of meetings for the 2022/23 academic year are as follows:

- Wednesday 14 September 2022, 8am
- Wednesday 12 October 2022, 8am
- Wednesday 7 December 2022, 8am
- Wednesday 11 January 2023, 8am
- *Wednesday 18 January 2023, 8am PROVISIONAL MEETING*
- Wednesday 8 March 2023, 8am
- Wednesday 17 May 2023, 8am
- Wednesday 5 July 2023, 8am

Note: These minutes are subject to approval as a correct record at the next meeting of the Forum.

THESE MINUTES HAVE BEEN PRODUCED, WHEREVER POSSIBLE, ON RECYCLED PAPER

SCHOOLS FORUM AGENDA ITEM

For Action

For Information

Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report provides an update on the Forum’s membership, continuing from the report (Document OI) that was presented on 18 May 2022.

Date (s) of any Previous Discussion at the Forum

18 May 2022 (Document OI).

Background / Context

The Forum’s membership arrangements, and Conduct of Meetings document, are subject to annual review.

Within good practice guidance, the DfE has stressed to authorities how essential it is that Forum membership arrangements keep pace with the changing landscape, in particular the conversion of maintained schools to academy status. The Authority must consider annually how best to provide for responsive arrangements, to ensure that the Forum remains representative and to avoid any unintended bias towards any one phase or sector, whilst continuing to ensure stability of membership and effective decision making. There are other requirements set by the DfE, in place to ensure that those affected by the Authority’s formula funding and DSG spending decisions are effectively represented.

We presented on 18 May the Forum’s composition for the 2022/23 academic year and details of the process for renewing / refreshing membership. We also presented the latest version of the Forum’s Conduct of Meetings and Procedures document, which will be in place for the 2022/23 academic year.

Details of the Item for Consideration

The purpose of this report is to provide an update on the membership of the Schools Forum for the 2022/23 academic year, following the recent ‘refresh’ processes.

The Forum’s membership at September 2022 is presented at Appendix 1.

We highlight the following:

- Sian Hudson has been confirmed as continuing as the representative of maintained nursery schools headteachers, for September 2022 to July 2024.
- Michelle Farr has been confirmed as replacing Dominic Wall as the representative of academy special schools, for September 2022 to July 2024.
- A number of existing Schools and Academies members have been re-elected for a further two-year term of office, September 2022 to July 2024.
- Jonathan Nixon joins the Forum as a new member, from September 2022, representing maintained primary school headteachers.
- Amanda Sleney joins the Forum as a new academies member, from September 2022, replacing Sir Nick Weller.
- Carol Dewhirst has ‘stepped down’ as a full academies member, but will act as a named substitute for Ashley Reed.
- At this time, we have 4 (out of 27) schools and academies membership vacancies, with 3 academies memberships currently vacant and 1 maintained membership (special school governors). We then, at this time, have a further vacancy with the representative of 16-19 providers (however, there are substitute arrangements in place).

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

No direct implications

Recommendations

Recommended – The Schools Forum is asked to consider and to note the information provided.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Schools Forum Membership September 2022

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools), School Funding Team
01274 432678
andrew.redding@bradford.gov.uk

Ref	Name of Member	Schools or Non-Schools Member	Membership Group	Location / School / Org	Term of Office End Date	Named Substitutes
1	Sian Hudson	Schools & Academies Member	Maintained Nursery Schools - Headteacher	Executive Headteacher St Edmund's Nursery School & Lilycroft Nursery School	Jul-24	
2	Bev George	Schools & Academies Member	Maintained Nursery Schools - Governor	Governor, Hirst Wood Nursery School	Jul-23	
3	Kirsty Ratcliffe	Schools & Academies Member	Pupil Referral Unit (maintained)	Headteacher, Park Aspire	n/a	
4	Nicky Kilvington	Schools & Academies Member	Maintained Primary Schools - Headteacher	Executive Headteacher Carrwood Primary School and Stocks Lane Primary School	Jul-24	
5	Jonathan Nixon	Schools & Academies Member	Maintained Primary Schools - Headteacher	Head of School, Cavendish Primary School	Jul-24	
6	Graham Swinbourne	Schools & Academies Member	Maintained Primary Schools - Headteacher	Headteacher Stanbury Primary School	Jul-24	
7	Kathryn Swales	Schools & Academies Member	Maintained Primary Schools - Headteacher	Headteacher, Gillington Primary School	Jul-23	
8	Emma Hamer	Schools & Academies Member	Maintained Primary Schools - Governor	Governor Carrwood Primary School	Jul-23	
9	Ian Morrel	Schools & Academies Member	Maintained Secondary Schools - Headteacher	Headteacher Titus Salt School	Jul-24	
10	Lyndsey Brown	Schools & Academies Member	Maintained Special Schools - Headteacher	Headteacher Oastler School	Jul-23	
11	Currently vacant	Schools & Academies Member	Maintained Special Schools - Governor	Currently vacant	Jul-24	
12	Richard Bottomley	Schools & Academies Member	Academies - AP Academy	Principal, Bradford Alternative Provision Academy Central	n/a	
13	Michelle Farr	Schools & Academies Member	Academies - Academy Special School	Principal Co-op Academy Southfield (Special School Academy)	Jul-24	
14	Amanda Slaney	Schools & Academies Member	Academies	Dixons Academies Trust	Jul-24	
15	Melanie Saville	Schools & Academies Member	Academies	Bradford Academy	Jul-24	
16	Helen Williams	Schools & Academies Member	Academies	Moorlands Learning Trust	Jul-24	Alison Kaye, Moorlands Learning Trust
17	Wahid Zaman	Schools & Academies Member	Academies	Nurture Academies Trust	Jul-24	Ailsa Hoyland, Nurture Academies Trust
18	Currently vacant	Schools & Academies Member	Academies	Currently vacant	Jul-24	
19	Currently vacant	Schools & Academies Member	Academies	Currently vacant	Jul-24	
20	Brent Fitzpatrick OBE	Schools & Academies Member	Academies	Exceed Academies Trust	Jul-24	
21	Ashley Reed	Schools & Academies Member	Academies	Bradford Diocesan Academies Trust	Jul-24	Carol Dewhirst OBE
22	Mathew Atkinson	Schools & Academies Member	Academies	Priestley Academies Trust	Jul-23	
23	Michael Thorp	Schools & Academies Member	Academies	Pennine Academies Yorkshire	Jul-23	
24	Heather Lacey	Schools & Academies Member	Academies	Shirley Manor Primary Academy	Jul-23	
25	Victoria Birch	Schools & Academies Member	Academies	Beckfoot Trust	Jul-23	
26	Andrew Morley	Schools & Academies Member	Academies	Blessed Christopher Wharton Academies Trust	Jul-23	
27	Currently vacant	Schools & Academies Member	Academies	Currently vacant	Jul-24	
28	Gillian Simpson-Morris	Non-Schools Member	Private, Voluntary & Independent Early Years	Acorns in Eldwick Nursery	Jul-23	
29	Currently vacant	Non-Schools Member	16-19 Providers	Currently vacant	Jul-24	Nav Chohan (ShIPLEY College)
30	Tom Bright	Non-Schools Member	Trades Unions	Trades Unions - Teaching	n/a	
31	Unison (nominee)	Non-Schools Member	Trades Unions	Trades Unions - Non Teaching	n/a	
32	David Johnston	Non-Schools Member	Officer for Vulnerable Children	David Johnston	n/a	
33	Not Taken	Non-Schools Member	Roman Catholic Diocese (Bradford)	Not Taken	n/a	
34	Not Taken	Non-Schools Member	Church of England Diocese (Bradford)	Not Taken	n/a	
35	Junaid Karim	Non-Schools Member	Council for Mosques (Bradford)	Council for Mosques (Bradford)	n/a	

Summary of Membership Composition

Total no. of Memberships	35
Total no. of Schools & Academies Memberships	27
<i>Within this - no. of maintained school Memberships</i>	<i>11</i>
<i>Within this - no. of academies Memberships</i>	<i>16</i>
Total no. of Non-Schools Memberships	8
% of Schools Members to Non-Schools Members	77%
Total no. of Governor Memberships (maintained)	3

This page is intentionally left blank

SCHOOLS FORUM AGENDA ITEM

For Action

For Information

Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report provides the initial confirmation of carry forward balances held within the Dedicated Schools Grant at the close of the 2021/22 financial year.

Date (s) of any Previous Discussion at the Forum

Estimates of balances to be held at 31 March 2022 were presented to the Schools Forum on 8 December 2021 and again on 12 January 2022. These estimates were included in the Schools Forum's DSG recommendations and decisions process for the 2022/23 financial year.

Background / Context

The Local Authority finalises its forecast of the DSG planned budget for the following financial year for presentation to the School Forum's annual January meeting. This planned budget is constructed on known factors and known data, but also incorporates a number of estimates, especially of expenditure, that firm up during the year. The forecast of balances to be carried forward at the end of each financial year, which form part of the planned budget and which are presented to the Forum in December and again in January, are based on estimates pulled together mid-November.

After our DSG planned budget is agreed by the Forum in January, and by Council in February, the Schools and the Central Schools Services Blocks have a relatively small number of 'moving parts'. The Early Years and High Needs Blocks however, are subject to a significant amount of movement. A normal part of the annual DSG management process is the reconciliation of planned vs. actual spending and estimated vs. actual carry forward balances. The Authority, with the Schools Forum, has always taken a prudent approach in its forecasting, seeking to ensure that the DSG does not have the additional burden of needing to compensate for a deficit resulting from an over-estimation of income or from an under-estimation of net expenditure in the previous year. The Authority, with the Schools Forum, has also always sought to hold a reasonable value of un-committed 'resilience' reserve, so that unexpected or higher than expected costs can be managed.

Surplus balances brought forward are available to be spent on a one off basis only. When previously considering such balances, the Forum has sought to avoid allocating these in support of on-going expenditure pressures. The Schools Forum recommended the use / retention of the balances estimated to held at 31 March 2022 at the meeting held on 13 January 2022. £1.434m of balances have been committed for spending within the 2022/23 DSG planned budget (see Appendix 1 for the Block distribution of this).

We separate balances according to the four block DSG structure. Balances can be used across all blocks. In practical terms however, in the National Funding Formula context, it is now useful for the DSG's balances to be presented on a block-specific basis. The starting assumption is that the balance attributed to each block is spent on pressures within that block, unless a specific decision is taken to transfer balances between blocks. To stress, the DSG Regulations permit balances to be used across all the blocks. What we have established is a locally determined informal block ring-fencing policy.

Balances transferred between financial years within de-delegated funds in the Schools Block are 'ring-fenced' to maintained schools. This is because only maintained schools contribute to these funds. Surplus balances carried forward can be released back to maintained schools through adjustments to the values of the contributions taken for access to de-delegated funds in the next financial year. The DSG Regulations currently permit the writing off of any net deficits related to de-delegated funds from the Schools Budget. To date however, we have not ever done this.

The Growth Fund and Falling Rolls Fund are treated as ring-fenced funds within the Schools Block. Our practice has been to carry forward any unspent balances, to be retained to be used for their purposes, rather than these being recycled generally back into the Schools Block. The DSG Regulations require that the balances held within the Growth Fund and the Falling Rolls Fund, and in de-delegated funds, are specifically presented to the Schools Forum. The Disability Access Fund (DAF) monies within the Early Years Block are also expected by the DfE to be earmarked for this purpose and identified separately.

By the February 2020 Finance Regulations, the DfE amended the provisions that relate to the addition of non-DSG income into the Schools Budget, and to the treatment of DSG account deficits, with the affect that:

Background / Context

- The Authority is not required to obtain the permission of the Schools Forum to carry forward or write off deficits within the DSG. Authorities are required either to carry forward any cumulative deficit in their Schools Budget to set against DSG in the next funding period; or to carry forward some or all of the deficit to the funding period after that, in order to determine how much resource is available to be spent during the funding period.
- Where an authority's DSG account is in deficit, the authority must receive permission from the Secretary of State to add non-DSG income into the Schools Budget, either for the purposes of contributing to a deficit or to support (match fund) activities funded by the DSG.

The statutory basis then, that applies to the 2021/22 DSG account, is that an overall deficit must be carried forward to be dealt with from future DSG income, unless the Secretary of State authorises an authority not to do this, and that authorities are not permitted to fund any part of the deficit from sources other than the DSG (or any specific grants whose conditions allow them to be applied to the schools budget) without the authorisation of the Secretary of State. Bradford's DSG is not in deficit at the end of 2021/22 and there are no additional contributions from non-DSG income sources into the Schools Budget in 2021/22 or in 2022/23.

Through the current DSG Conditions of Grant, the DfE requires local authorities that have an overall cumulative DSG deficit, of 1% or more at the end of the financial year, to submit a report to the ESFA on how this deficit will be recovered. We have previously reported that the DfE has introduced this in the light of the growing number of local authorities setting deficit DSG accounts, largely due to over spending within their High Needs Blocks. 1% of our DSG is roughly £6m. Our DSG account is in surplus at the end of 2021/22.

The DfE also expects all local authorities to regularly present to their School Forums a DSG Management Plan, which sets out the expected future year DSG position and explains the pressures on spending and mitigating actions that are to be taken, especially with reference to high needs provision. We last presented our DSG Management Plan to the Forum on 12 January 2022.

The Schools Forum will receive, as normal in the autumn term and usually in December, an analysis of the forecasted position of DSG balances at the end of the 2022/23 financial year. The Authority has been / is currently reviewing and considering, with the Schools Forum, the position of the surplus balance that is held within the High Needs Block. An update on this is provided in Document OR.

Details of the Item for Consideration

Summary - Initial Confirmation of DSG Balances Brought Forward from 2021/22

Appendix 1 presents:

- **The balances by DSG block that were estimated to be held at the end of the 2021/22 financial year – a total of £32.115m.** This estimate was calculated in December 2021 and reported to the Schools Forum within Document NZ, presented on 12 January 2022.
- **The actual balances by DSG block that have now been initially confirmed, following the closure of the financial year at 31 March 2022 – a total of £33.825m, representing an additional £1.710m on the estimated figure.** Please note that this is an initial confirmation, which is not yet inclusive of the final Early Years Block funding adjustment, which will be confirmed by the DfE in autumn based on our January 2022 Census. Of the £33.825m, £23.021m is held within the High Needs Block.

Members are asked to note:

- £1.034m of the confirmed £6.684m Schools Block balance is attached to maintained school de-delegated funds and is ring-fenced. Members are reminded that the Schools Forum, in its recommendations for the 2022/23 planned budget, released an estimated £0.150m of the forecasted de-delegated funds balance to support the cost of the maternity / paternity scheme for maintained primary schools.
- £1.051m of the confirmed £6.684m Schools Block balance is attached to the Growth Fund and is ring-fenced.
- £0.500m of the confirmed £6.684m Schools Block balance is attached to the primary phase Falling Rolls Fund and is ring-fenced. We confirmed with the Schools Forum in March that there are no Falling Rolls Fund allocations in 2021/22 and so the full value of the fund is carried forward into 2022/23.

Details of the Item for Consideration (continued)

- £0.593m of the £3.889m Early Years Block balance is attached to the Disability Access Fund (DAF) and is ring-fenced, in line with the DfE's expectations. Members are reminded that the Schools Forum, in its recommendations for the 2022/23 planned budget, continued the increased value of DAF allocation per pupil (increased from the new minimum of £800 to £1,000 per pupil) to support the fuller in year allocation of the DAF funding available through the Early Years Block. £0.072m of the £3.889m is attached to delegated funds and is also ring-fenced.
- The difference of + £1.282m in carry forward balance held within the High Needs Block against the estimate, which is the cumulative result of differences between the forecasted and actual cost of high needs model allocations, and the cost of other placements and centrally managed services, between December 2021 and March 2022. There continues to be a significant amount of financial movement, which is taking place on a backdrop of continued growth in the numbers of EHCPs. This movement combines to mean that it is challenging to forecast in December (based on information available up to November) what the profile of spend will be for the rest of the financial year up to March. Members are reminded that one of our main aims has been to set a High Needs Block planned budget, and to take an approach to forecasting expenditure, which builds sustainable affordable capacity.
- £0.231m surplus balance is held within the Central Schools Services Block (CSSB). We have previously transferred any net under spend in CSSB budgets to the carry forward balance retained within the Schools Block. We transferred from the CSSB to the Schools Block £0.005m of surplus balance at the end of 2018/19 and £0.151m at the end of 2019/20. Against this cumulative surplus transfer, because the CSSB held a deficit at March 2021, we charged the Schools Block balance for the value of this deficit (£0.078m). This was approved by the Schools Forum on 7 July 2021. Because we anticipate that the CSSB will come under greater financial pressure going forward, as result of reduced annual uplift, continued reduction to final cessation of the historic commitments funding, and reducing pupil numbers in mainstream schools and academies, we are minded to retain the £0.231m balance at this time in support of the CSSB going forward. Appendix 1 is presented on this basis.

Recommendations

The Schools Forum is asked to note the information presented.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Initial Confirmation of DSG Balances held 31 March 2022

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools)
01274 432678
andrew.redding@bradford.gov.uk

This page is intentionally left blank

Schools Forum Document OO Appendix 1 6 July 2022

Initial Confirmation of DSG Balances held at 31 March 2022 (at the end of the 2021/22 Financial Year)

Please note that this initial DSG balances statement is not yet inclusive of the final Early Years Block adjustment for 2021/22, which will be confirmed by the DfE in the autumn. Our 2021/22 Early Years Block funding will be adjusted, by the DfE, for the differences between January 2021 and January 2022 Census entitlement numbers for funding relating to the 3/12ths period January – March 2022. We estimate that this adjustment will be in the region of positive £0.10m. The individual Schools Block, High Needs Block and Central Schools Services Block balances however, are now confirmed and will not change.

	Schools Block	High Needs Block	Early Years Block	Central Schools Services Block	Total DSG Balances
Forecast (presented 12 January 2022)	£6.375m	£21.739m	£4.001m	£0.000m	£32.115m
Initial Confirmation Presented 6 July 2022	£6.684m	£23.021m	£3.889m	£0.231m	£33.825m
Difference £	+ £0.309m	+ £1.282m	- £0.112m	+ £0.231m	+ £1.710m
Difference as a % of Current DSG Block Value	0.06%	1.22%	0.28%	6.54%	0.27%
Value committed within 2022/23 Planned Budget	£0.747m	£0.000m	£0.687m	£0.000m	£1.434m

Within the Schools Block balance of £6.684m are the following confirmed 'ring-fenced' balances:

- Growth Fund £1.051m (as forecast)
- Falling Rolls Fund £0.500m (as forecast)
- De-Delegated Funds £1.034m (+ £0.239m on forecast)

Within the Early Years Block balance of £3.889m are the following confirmed 'ring-fenced' balances:

- De-Delegated Funds £0.072m (as forecast)
- Disability Access Fund £0.593m (+ £0.135m on forecast)

This page is intentionally left blank

SCHOOLS FORUM AGENDA ITEM

For Action

For Information

Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report provides a briefing on the DfE's latest consultation on the transition to the 'hard' National Funding Formula in the Schools Block, which was published on 7 June 2022. The deadline for responses to this consultation is 9 September 2022.

Date (s) of any Previous Discussion at the Forum

The Forum considered at the 18 May meeting the DfE's response to the September 2021 consultation (which was published at the end of March).

Background / Context

The DfE in 2018/19 implemented the National Funding Formula (NFF) across the Dedicated Schools Grant (DSG), and within the Schools Block, in 'soft' format, meaning that local authorities can still decide the formulaic calculations that are used for distributing Schools Block funding to mainstream primary and secondary schools and academies, albeit within tight Regulations. Local authorities continue to set their own Growth Fund and Falling Rolls Fund arrangements. There currently are also elements of Schools Block funding that are not yet covered by the NFF, the most prominent of these being the funding of PFI (Building Schools for the Future).

The DfE has for some time stated that its longer-term intention is to transition to a 'hard' formula approach, where Schools Block formula allocations will be calculated by the DfE, rather than by local authorities, using a national funding formula. The DfE launched, in July 2021, a consultation, to gather initial views on how to complete the transition to the 'hard' NFF. The DfE published its response to this consultation at the end of March 2022 and we presented a briefing on this to the Schools Forum meeting 18 May. Within this briefing, we highlighted that:

- Implementing a 'hard' NFF remains the long-term aim of the DfE, linking to the March Schools White Paper. However, the DfE understands that transition must be actioned carefully, to minimise turbulence. Change will happen gradually and following impact review at each stage.
- For 2023/24, the DfE will instruct all local authorities to use each of the NFF factors, and *only* these factors. The DfE will also instruct that all authorities that do not already 'mirror' the NFF must move their formula to be closer to the NFF values, by at least 10%. Those that already mirror will have a '1% threshold' allowance. This suggests that authorities that already mirror the NFF will have some, but not much, flexibility to vary their formulae to move away from NFF e.g. in order to manage affordability issues.
- The DfE continues to recognise the complexities of moving premises factors (split sites, PFI), as well as Growth Fund and Falling Rolls Fund arrangements, into a hard NFF. Regarding Growth and Falling Rolls, the DfE is minded to continue an element of local management of these funds.
- Review will be conducted of the services that are delivered by the Central Schools Services Block, which the DfE states will align with the Schools White Paper, and further consultation will take place. The option of de-delegation by local authorities will continue under the hard NFF. Multi Academy Trusts will continue to be permitted to 'top slice' and to pool funding, although the DfE is to investigate changes that could improve the transparency and consistency of these processes.
- The DfE will "not prioritise" bringing the funding of local authority maintained schools onto an academic year basis, in line with academies.

We have previously emphasised to the Schools Forum that:

- In anticipation of the transition to hard NFF, we have already moved to using the NFF for our local Schools Block formula (since 2018). So, much of what the DfE proposes about requiring authorities to move closer to the NFF from April 2023 isn't an immediate worry. Our concerns are more related to cost control during the final transition period.
- One of the biggest potential risks for us is the funding of PFI (Building Schools for the Future) within the Schools Block, where the Council and individual schools and academies have contractual commitments.
- Early Years and High Needs funding is expected to remain managed by local authorities.

Background and Context

- The Schools Forum will have an adjusted roll in the future, as there will be minimal direct Schools Block formula funding activity to manage. However, the Forum will still be an important local body going forward, including for early years, for high needs and for central services. How the Forum will sit alongside other partnership bodies, that are proposed to be developed from the SEND review, in the management of the High Needs Block, will be a specific aspect to consider.

Details of the Item for Consideration

The DfE's latest consultation can be found here:

<https://consult.education.gov.uk/funding-policy-unit/implementing-the-direct-national-funding-formula/>

This report summarises and highlights the key points, for consideration by Forum members, in advance of the Authority preparing and submitting a consultation response. The Authority will submit this response over the summer (to the 9 September deadline) and will give the Forum sight of this in its September meeting.

This latest consultation is rather technical. As such, it is more accessible to funding officers than to Forum members (and will likely be responded to nationally by officers rather than School Forums)! It does not deliver any major surprises, however, with the exception of split-sites funding. It moves incrementally from the previous consultation, primarily to present further options for, and details of where the DfE has got to so far on, the development of specific technical aspects of the hard National Funding Formula, especially split-sites funding, the Growth and Falling Rolls Funds and how Schools Block to High Needs Block contributions could continue. The consultation also sets out a proposed funding cycle (how and when key pieces of information that are needed to operate the hard NFF system would be collected, when consultations would take place, when local permissions would need to be sought from the ESFA). However, the wider key headlines are:

- Although there still isn't a date for when the hard NFF will be implemented, the DfE sets out the aim for full implementation within the next 5 years - by 2027/28 at the latest; sooner if possible, but no later.
- The Minimum Funding Guarantee will continue, and will be amalgamated with the NFF-floor, to provide a single protection mechanism that is fully pupil-led (removing indirect protection of school-led factors).
- De-delegation will continue, with a different process for authorities informing the ESFA (as no APT).
- The NFF will contain a split-sites factor, from April 2024. Local authorities will be required to use this factor, replacing their previous methodologies. The consultation sets out a proposed split-sites formula, which will quite significantly alter levels of funding for split-sites, especially in the secondary phase.
- Whilst, to achieve greater consistency, there will be further prescription and restriction, the Growth Fund and the Falling Rolls Fund are likely to continue to be managed locally. This approach is preferred by the DfE, rather than seeking to operate these funds on a single national basis. How the Growth Fund and the Falling Rolls fund will operate, and how these funds can be used to support schools and academies, is being reviewed and also potentially extended, including explicitly to incentivise the management of surplus places (supporting the "repurposing and removing" of space). Change is expected for April 2024, with funding ring-fenced and 're-baselined' at 2023/24. Levels of growth funding allocated to authorities may not continue at current levels, as both the growth and reduction in numbers will be taken into account.
- Whilst work is continuing on an approach to PFI funding, the DfE does not yet give any timescales for the implementation of a new NFF mechanism nor any details of this.
- There will continue to be a local option for the movement of Schools Block funding to the High Needs Block, with local agreement but via application to the ESFA, using a standard 'menu' of options. The role of the Schools Forum here, in relation to the local partnership arrangements that are proposed by the SEND review, is to be further considered.
- The composition of the NFF itself is being reviewed, to ensure that this remains relevant and fit for purpose. A specific area of review that is highlighted is the Low Prior Attainment factor, which has recently been affected by the COVID-19 pandemic and by changes in assessments.
- There will be further consultations that will take place in the near future, including on the position of the Central Schools Services Block (following the White Paper), the operation of the Schools Block following the SEND review reforms, PFI, and the funding cycle. No timescales are given for these additional consultations.
- The concept of a 'notional SEND' budget will continue under the hard NFF. It is expected that a fully consistent definition will be applied at the point the hard NFF is implemented. In advance of this, for 2023/24, the DfE will provide new guidance for local authorities with the aim of improving consistency.
- The DfE is considering providing a 'calculator tool' so that schools and academies can plan their budgets.

Details of the Item for Consideration

- The timing of local consultations on still locally-relevant Schools Block matters, such as transfers to the High Needs Block and de-delegation, will likely need to take place earlier in the cycle than it does now ('by' autumn rather than 'in' autumn), in order to pass on the critical information that the ESFA will then use to calculate individual allocations for schools and academies.
- The DfE will continue the 'popular growth' funding mechanism, that is currently applied to academies, where academies that have taken over underperforming undersubscribed schools see significant in year growth in pupil numbers can be funded on estimates of in year numbers, rather than on actual lagged census numbers. The DfE states that there has been criticism that maintained schools are not eligible for this mechanism and so now asks for views on whether this mechanism should be extended to maintained schools.
- As has been highlighted from analysis of previous consultations, the role of the Schools Forum is set to change in the future, in the light of the reduction in the local activity that will be associated with the management of the Schools Block, as well as in response to the SEND review reforms and the Forum's role in the management of funding of high needs provision.

Schools Block to High Needs Block Contributions

The first section of the consultation focuses on SEND funding, and the links between the Schools Block and the High Needs Block. Transfers from the Schools Block to the High Needs Block are currently permitted, up to a value of 0.5% of the Schools Block, with the authorisation of Schools Forum. Amounts above 0.5%, or where the Schools Forum does not agree, require local authorities to submit a 'disapplication' request to the Secretary of State (SoS). The consultation proposes to streamline processes here, and to limit the circumstances under which a local authority can apply for a contribution to the High Needs Block, by reducing NFF-calculated allocations for individual schools and academies, to a 'menu of options', rather than continuing the relative flexibilities that are available currently. The detail of these options, and further criteria, are still to be determined, but the criteria are expected to reflect the aims of the SEND Review green paper. The method of reducing school and academy NFF-based allocations, that would follow from a locally-agreed contribution to the High Needs Block, is also proposed to be standardised, with local authorities instructing the ESFA using a pre-set 'adjustments menu' of pupil-led NFF formula factors.

In the new process, under the hard-NFF, local authorities that apply to the SoS for a contribution from NFF allocations will be expected to consult earlier, and more widely, and to provide evidence of this consultation within their disapplication requests. As stated above, the role of the Schools Forum in the management of transfers of funding is to be reviewed in the context of the operation of local partnerships, following the SEND review.

Notional SEND

In order to ensure consistency, the consultation proposes that a national standard calculation of Notional SEND is implemented at the point the hard-NFF is established. However, the latest consultation does not yet propose a calculation. Currently, local authorities use their own methodologies to determine their values of Notional SEND budgets within mainstream primary and secondary formula funding. There is significant variation in practice. In an initially step, for 2023/24, the DfE has said that it will provide new guidance for local authorities with the aim of improving consistency. This may affect our 2023/24 arrangements,

As part of the 2019 SEND Call for Evidence, some responses called for the Notional SEND budget to be 'ring-fenced'. However, the DfE is not proposing to take this step.

Growth and Falling Rolls Funding

In the first consultation, the DfE proposed to introduce a standardised national centrally managed process for the allocation of Growth and Falling Rolls funding to schools and academies. Following responses, including our own, the DfE has stepped back from this and, although does set out an option for a national process, states that its preferred way is to continue to operate these funds locally, but combining local flexibility with more prescription and regulation. We assume that the DfE will take this option forward. So, although there will be greater consistency, this proposal does 'step away' from establishing a completely centralised approach to funding.

Where local flexibility is retained, the DfE will make changes to legislation to mandate that local authorities prepare more consistent policies and also restrict the operation of these funds. Each local authority would be required to submit their criteria to the DfE for scrutiny. The formulation of growth and falling rolls policies would be standardised, to only allow certain methods of allocation (e.g. lump sum, or per pupil, or both). There would be minimum requirements in respect of the values of allocations that are passed out to qualifying schools and academies. The DfE may also choose to set minimum expectations and set specific circumstances in which growth and falling rolls funding must be automatically triggered. The DfE could also require local authorities to 'ring-fence' growth and falling rolls funding, meaning that, if these funds are unspent, they could be added to DSG balances to be carried forward or could be repaid back to the DfE.

Details of the Item for Consideration

In respect of the Falling Rolls Fund, the DfE states that it is considering whether to continue to allow only 'good' or 'outstanding' schools and academies to access this. The DfE also asks for views about widening the scope of growth and falling rolls funding to allow local authorities to use this funding to repurpose or remove surplus capacity. This is an area of policy development that we would be especially interested in, in the context of our current demographic trends.

It appears from the consultation that both growth and falling rolls would be funded at DSG-level. Currently, we only receive DSG funding for growth; falling roll funding is generated through top-slicing Schools Block funding. This might be a significant positive. However, against this, we may find that the value of growth funding that we receive at DSG-level may reduce, as the DfE suggests that reductions in numbers will be offset from growth in numbers in order to allocate growth funding. At the moment, we receive growth funding taking account of gross growth only. This is an aspect of the changes that we need to monitor.

Split-Sites

Split-sites funding is not currently included in the National Funding Formula. We use our own local approach, as do all other local authorities, and we are funded by the DfE based on the previous year's cost. Only a small number of our schools and academies currently receive split-sites funding – 8 primary and 3 secondary. Our spend on this factor in 2022/23 is £0.425m (£0.137m primary and £0.288m secondary).

The latest consultation sets out in technical detail a proposal for a NFF split sites factor, which would be implemented (and would be compulsory) at April 2024. The consultation proposes to establish a new clear definition of split sites for a) basic eligibility and b) distance eligibility. Funding is proposed to be allocated only on a lump sum basis, rather than per pupil, with the value linked to a % of the lump sum that is allocated by the NFF. In effect, the factor provides additional lots of lump sum funding to recognise that split-site schools and academies have duplicated and additional fixed costs.

Without presenting the full technical detail in this note, we highlight 5 points for the Forum's awareness:

- We will need to complete a data collection and verification exercise with our split-site schools and academies, in order to provide the ESFA with the information it needs to calculate split-sites funding within the NFF. We will be required to submit information within our 2023/24 APT return.
- The DfE's proposed model potentially will change (and will reduce for some) the value of funding a school or academy receives for split-sites, depending on their circumstances. It is not particularly 'generous' by comparison with our existing approach, especially for the secondary phase. There are a number of reasons for this, including the use of a lump sum that is linked the NFF-lump sum.
- Some of our existing schools and academies may no longer be eligible for split-sites funding, depending on their circumstances and how these sit with the DfE's new definitions. We will be able to discuss this with each school and academy as part of our data collection and verification exercise.
- Significantly, the DfE proposes to exclude schools and academies that operate split-site playing fields (where they also have maintenance costs of these) from accessing split site funding. A requirement for eligibility will be that the site has buildings that are used for education (and not ancillary) purposes. If implemented, this will have a significant impact on 2 of our secondary schools / academies that currently receive funding for this purpose through our split-sites factor.
- The DfE has stated that any change in split-sites funding that comes as a result of formula change will be protected by the Minimum Funding Guarantee in 2024/25, which will continue. A change in formula is something we will need to manage within our 2024/25 cycle.

Exceptional Premises Factors

Whilst this is not currently relevant to us, for the Forum's awareness, the DfE proposes to restrict and to standardise under what circumstances schools and academies may be given additional premises funding through the exceptional circumstances factor. Some current uses of the exceptional circumstances will instead be incorporated into existing factors, including PFI.

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

The outcomes of the latest NFF consultation will directly influence the Schools Block, from April 2024. We will require further, more detailed information, to be published in order to assess the net financial impact on our Schools Block and on individual school and academy budgets in 2024/25. The consultation does clearly point to a change in the way split-sites funding will be calculated, which, although will not have a significant impact on the Schools Block overall, may significantly alter the funding that individual schools and academies currently receive, albeit that the Minimum Funding Guarantee will provide protection. The proposals around the Growth and Falling Rolls Funds may have significant implications both for the amount of money available to us to support these issues, as well as how these monies can actually be used to support school and academy budgets (especially in the context of reducing pupil numbers). The proposals will also have implications for how wider high needs financial pressures are managed under a hard NFF in the future, and the processes for agreeing Schools Block contributions to the High Needs Block.

Recommendations

Recommended – the Schools Forum is asked to consider and to note the information presented.

List of Supporting Appendices / Papers (where applicable)

None

Contact Officer (name, telephone number and email address)

Jonty Holden, Principal Finance Officer, School Funding Team
(01274) 431927
Jonty.Holden@Bradford.gov.uk

This page is intentionally left blank

SCHOOLS FORUM AGENDA ITEM

For Action

For Information



Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report provides an overview / introduction to local formula funding review priorities for 2023/24.

Date (s) of any Previous Discussion at the Forum

The Schools Forum made its recommendations on the 2022/23 DSG and formula funding arrangements on 12 January 2022.

Background / Context

See the details for consideration below.

Details of the Item for Consideration

We normally begin to receive in July detailed information from Government on the next year's Schools Block, High Needs Block and Central Schools Services Block settlements and associated formula arrangements. This enables us to begin to consider affordability issues, and to formulate plans for consultation, which we can begin to discuss with the Schools Forum, and then with schools, academies and other providers, from early in the autumn term. In the last couple of years, the Early Years Block settlement and formula arrangements have not been published until late autumn, after the Chancellor's Autumn Spending Statement. We anticipate the same timetable this year, meaning that, whilst consultation on 2023/24 formula funding arrangements within the Schools and High Needs Blocks will begin in October, our consultation on Early Years Block formula funding is likely to commence later in November / early December. However, if the Early Years Block settlement is published earlier, we will aim to bring our timetable forward.

Overall Guiding Context 2023/24

We have made a number of significant changes to our formula funding approaches across all the DSG Blocks, since the beginning of National Funding Formula-based arrangements. We expect that our recent decisions and actions will inform how we will respond to announcements concerning the 2023/24 DSG and formula funding arrangements and changes.

From recent consultations and announcements, we know that significant changes in DSG management, decision making and formula funding arrangements are on the horizon. In particular, the further transition to, and final establishment of, the hard National Funding Formula within the Schools Block and the implementation of the outcomes of the national SEND review, will have significant implications for the whole DSG, for formula funding arrangements and decision making, as well as for the budgets of individual schools, academies and other providers. The extent to which these two main changes will materially affect our 2023/24 financial year formula funding arrangements might be limited, with the weight of further changes possibly coming after 2023/24. However, we must continue to operate our local arrangements within ever tightening regulations and with an eye to ensuring that we follow (or at least do not go against) the 'direction of travel', so as to minimise the extent to which any decisions we take locally for 2023/24 will cause turbulence in the near future.

From the Chancellor's Autumn Spending Statement October 2021, and from other announcements and guidance, we expect that the growth in the 2023/24 financial year DSG settlement (vs. 2022/23) will not be at the level of 2022/23 (vs. 2021/22). This is because the Autumn Spending Review clearly weighted the current 3 year spending settlement into 2022/23. We expect that a reduction in the level of growth in funding per pupil will come across the board, affecting all 4 of the DSG Blocks. The DfE may review this position, in the light of the current financial climate. We will not know this until the settlements are announced and so must currently plan on the basis of previous guidance. Generally, a lower settlement means that we will have less headroom available than we had in 2022/23 on which to set our formula funding arrangements for 2023/24. We expect that reducing early years entitlement and primary-phase pupil numbers will also contribute to a reduced amount of headroom, especially in the Early Years and Schools Blocks. However, reducing numbers will also affect the High Needs and Central Schools Services Blocks.

In advance of further announcements, at this stage, we anticipate that the 2023/24 DSG setting and formula funding round will be challenging.

Details of the Item for Consideration

Schools Block 2023/24

The DfE has already announced steps in 2023/24 to move all local authorities closer to the National Funding Formula (NFF), for the calculation of budget shares for their mainstream primary and secondary schools and academies. Whilst we await final technical details of the new restrictions, we know that the DfE will require all authorities to use 'all and only' the NFF factors in their formulae, and that all authorities that are not currently mirroring the NFF must move closer to it. Authorities that are mirroring the NFF will only have limited flexibility to move away from mirroring. As we are currently mirroring, and have done since 2018/19, we do not anticipate that the 'all and only' restriction will require substantial new response. A key question, which has not yet been clarified in guidance, is whether the Reception Uplift factor will be available for 2023/24. This factor is not included in the NFF. From a recent email that we received from the ESFA (as we used this factor on a one off basis in 2022/23), it is clear that the ESFA is currently thinking about the consequences of removing this factor and is seeking views on whether this would be an issue.

As presented in Document OP, the DfE has published another round of NFF consultation. The majority of proposals e.g. for the operation of Growth Fund, Falling Roll Fund, Split Sites funding, will not be implemented until (at least) April 2024. There is no timescale set yet for changes to PFI formula factors. Therefore, we do not anticipate that there will be substantial new restrictions on how we can operate these funds and factors in 2023/24, meaning that we can continue our existing approaches, if this is what we decide. However, we need to carry out a split sites 'verification exercise', in order to ensure that the data we provide to the ESFA (so that the ESFA to take over the funding of split site schools and academies from April 2024) is accurate.

We have already highlighted the following to the Forum as specific matters that we will need to respond to in 2023/24. Other specific matters may come out of the publication of the DfE's operational guidance.

- The amalgamation of the 2022/23 Supplementary Grant into 2023/24 core formula funding for mainstream primary and secondary schools and academies. This is very likely to be 'determined for us' where we continue to mirror the NFF (as the DfE will adjust the NFF factors and values, including the Minimum Funding Guarantee and the Minimum Levels of Funding, to include the grant).
- The re-evaluation of business rates (NNDR), which is due at April 2023 and which may have cost implications for the Schools Block.
- The continued affordability of our Schools Block arrangements in relation to the impact of the 'lag' in data between DSG-level funding and school-level formula funding (as we needed to managed in 2022/23).
- The de-delegation of funds from maintained schools, which is subject to annual review. This includes de-delegation for the purposes of replacing the former School Improvement Monitoring and Brokering Grant (SIMB), which fully ceases at the end of March 2023.

In terms of other substantial possible changes that may affect the Schools Block, and our formula funding arrangements, in the 2023/24 financial year,

- We may reasonably expect the DfE to make adjustments to the primary and secondary NFF weightings and variable values, so as to maintain the distribution of funding at national level, when using updated October 2021 Census data. We also know that the DfE is currently reviewing the relative values of each of the NFF factors, but especially the value of the prior-attainment factor, which has been affected by the COVID-19 pandemic as well as by changes in assessments. More substantial changes may be delay until transition to the hard NFF has been completed, but it is possible that the DfE could alter the relative importance of different factors within the 2023/24 NFF. This may have implications for individual school and academy allocations. We know that the Minimum Funding Guarantee (MFG) will continue, which will provide protection, but we are not yet clear how the MFG can be set and what level will be affordable.
- linking with the SEND review, the DfE has stated that new guidance will be provided, which is aimed at moving authorities onto a more consistent basis for determining notional SEND budgets. We will need to respond to this within our 2023/24 arrangements and this may have knock-on implications, including for the High Needs Block.

Early Years Block 2023/24

It is expected that local authorities will continue to exercise local control over their funding of the early years entitlements, via the Early Years Block. The DfE's movement to hard National Funding Formula does not extend to the Early Years Block. There are significant restrictions in place already, which control how local authorities fund providers for their delivery of the early years entitlements. These restrictions could be altered or increased in 2023/24. The DfE has not yet made any announcements. If there aren't any directed changes, at this time, we do not envisage making substantial technical amendments to how our our Early Years Single Funding Formula (EYSFF) operates in 2023/24. We have however, previously identified the following three

Details of the Item for Consideration

significant matters that we will need to consider within our proposals for 2023/24. These are more focused on values of rates of funding that our EYSFF allocates to providers, rather than technical changes in how our EYSFF operates.

- We previously began to reduce the proportion of our 3&4-year-old Early Years Single Funding Formula (EYSFF) that is allocated via the Deprivation & SEND supplement, with the original intention to reduce this down over 3 years from 9.5% to the average of our statistical neighbours, which is rounded at 6%, in support of maximising our Universal Base Rate whilst securing the financial sustainability of our Early Years Block. However, recognising the impact of the COVID-19 pandemic, we did not take the planned second step (to reduce from 8% to 7%) in 2021/22. We paused this again in 2022/23. This is now however, perhaps the most pressing matter for specific review for 2023/24. We have continued to allocate reserves (one off monies from brought forward balances) held within the Early Years Block to protect the value of the 3&4-year-old Universal Base Rate at its current year level of £4.39 per hour. Our modelling clearly indicates that we cannot continue to afford a Base Rate at this level when we also spend 8% on the Deprivation and SEND supplement. The critical matters for us to resolve are how our EYSFF arrangements are financially sustainable by the time one-off monies are no longer available, and what the balance should be between Base Rate funding and additional funding that is targeted towards deprivation.
- Our spending on the 2-year-old offer currently exceeds the funding we receive in the Early Years Block specifically for the 2-year-old offer. This places financial pressure on the Early Years Block, as well reduces the funding that is available to support the 3&4-year-old entitlement, which is linked to the matter explained above. Recognising this, we began in 2022/23 to take small steps, by not fully passing through to providers the increase in the 2-year-old funding rate that we received from the DfE. We must review how this action continues (and increases) in 2023/24 in order to contribute to securing the financial sustainability of the Early Years Block.
- The continuation (or otherwise) of the maintained nursery school supplement from April 2023 is a significant matter for the Early Years Block. This supplement is used to protect the rates of funding received by nursery schools at pre-2017 national reform levels. If this supplement was to cease, or to substantially reduce, this would have direct implications for the financial sustainability of our nursery schools, but also potentially for the commitments that are placed on the surplus carry forward balance that we hold within the Early Years Block. This will affect whether this balance continues to be available to support the wider costs of our current EYSFF or whether it must be re-directed to manage the impact of the cessation of the supplement.

We continue to roll out the new Bradford Provider Headcount Portal for the collection of entitlement delivery information from providers. This Headcount Portal replaces the previous Bradford Provider Gateway that PVI providers, and also that schools and academies that deliver the 2-year-old entitlement, used to submit their entitlement delivery information to the Local Authority. The Authority's medium-term aim is that the Bradford Provider Headcount Portal will also be used to collect 3&4-year-old entitlement delivery information from schools and academies, meaning that the submission of this entitlement delivery information via the Headcount Portal will replace the current approach, whereby this information is extracted from the school's / academy's termly census return that is submitted to the DfE. There are significant advantages to using a discrete mechanism for the collection of entitlement delivery information from all providers. At this time, whilst we move towards the new Portal, and in advance of us having the opportunity to review again with all providers the pros and cons of a different (starters and leavers style) approach that could be based on the new Portal, we do not envisage changing how provider entitlement delivery is counted. This means that, at this time, we envisage continuing to use in 2023/24 the existing termly headcount methodology, with a 2nd termly headcount for the 2-year-old entitlement.

Finally, whilst we currently do not envisage making substantial technical changes to our EYSFF in 2023/24, unless required to do so by the DfE, the DfE's national SEND review does propose that the early years sector is brought into the national SEND system. This will potentially alter early years SEND and EHCP systems and support mechanisms, including financial support mechanisms. The DfE has indicated that these changes will likely require a review of the Early Years Block, especially in relation to the Early Years SEND Inclusion Fund (EYIF) and the Disability Access Fund (DAF). At this time, we do not have any details, and we are not clear about timescales for changes, but it is possible that the DfE could alter its guidance for local authorities on how the EYSFF, EYIF and DAF mechanisms are to operate 2023/24. If changes are made, we would review our responses with the Early Years Working Group and then consult with providers.

High Needs Block 2023/24

At April 2020, we introduced a new Banded Model for the allocation of 'top up' funding for EHCPs. We also introduced a new Day Rate Model for the funding of the PRUs / Alternative Provision Academies for pupils permanently excluded. These models have been consolidated and uplifted in both 2021/22 and in 2022/23. In 2021/22, we introduced, initially in trial for one year, an amended SEND Funding Floor. In advance of the SEND review publication, we chose to continue the Floor mechanism in 2022/23. Since the introduction of the

Details of the Item for Consideration

National Funding Formula within the Schools Block, we have chosen not to amend our definition of Notional SEND, but we have identified that this definition does need closer attention, including with reference to any changes that may be directed following the national SEND review.

Although significant changes are on the horizon, it is not yet clear the extent to which the proposed SEND review reforms will impact on 2023/24 high needs formula funding arrangements. This should become clearer as operational guidance is published for local authorities, from July. We do anticipate that the DfE will adjust guidance in relation to the determination of notional SEND budgets for mainstream schools and academies. However, we suspect that the more significant structural funding changes that are proposed (or that are “hinted at”) in the DfE’s review document – the development of a national top-up banding system, the redesign of place-element and element 2 (£6,000 threshold) funding, the redesign of the approach to funding PRUs and Alternative Provision academies, the incentivisation of inclusion in mainstream settings – will not be implemented before April 2024.

Pending this further guidance from the DfE, which we will need to respond to as necessary, we do not at this time envisage making substantial technical changes to our high needs formula funding approaches in 2023/24. We anticipate that the most pressing issue for our high needs formula funding arrangements will be their affordability within the 2023/24 High Needs Block funding envelop. As we have previously warned, we are likely to need to exercise restraint, especially in determining the level of any increases in EHCP top-up funding in 2023/24. We are also likely to need to exercise restraint with the aim of managing the cost of the SEND Funding Floor, should this mechanism continue in 2023/24. This restraint will be discussed ‘in the round’ with the Schools Forum in the autumn term, as part of our formula funding consultations and also within the current and continuing discussions regarding the position of the surplus balance that is held in the High Needs Block.

Timetable

At this time, we anticipate following the timetable that we have used in previous years for the development of consultation, and decision making, on DSG formula funding arrangements for 2023/24.

This begins by inviting Forum Members to attend one of 3 Formula Funding Working Group sessions that have been arranged for Tuesday 27 September (8am), Wednesday 28 September (8am) or Tuesday 4 October (8am). As last year, these sessions will enable Forum Members to consider in more detail the impact of formula funding decisions and to explore and guide the proposals for 2023/24 that are anticipated will be set out for consultation in October. It is anticipated that these sessions will be held remotely.

The Early Years Working Group will be convened early in the autumn term to begin to more closely consider the Early Years Single Funding Formula (EYSFF) for 2023/24.

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

As set out in the report (this is an item for information)

Recommendations

- (1) The Schools Forum is asked to consider and to note the information provided.**
- (2) Forum Members are asked to note that the Early Years Working Group will be convened early in the autumn term to begin to more closely consider the Early Years Single Funding Formula for the 2023/24 financial year.**
- (3) Forum Members are invited to (remotely) attend a ‘Formula Funding Working Group’ session, on Tuesday 27 September (8am) or Wednesday 28 September (8am) or Tuesday 4 October (8am). As in previous years, these sessions will enable Forum Members to consider in more detail the impact of national formula funding decisions and to explore and guide the proposals for 2023/24 for Bradford’s Schools and High Needs Block formula funding arrangements that are anticipated will be set out for consultation in October.**

List of Supporting Appendices / Papers (where applicable)

None

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools)
01274 432678
andrew.redding@bradford.gov.uk

This page is intentionally left blank

SCHOOLS FORUM AGENDA ITEM

For Action

For Information

Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report provides an update on High Needs Block matters, including the development of the plan for the High Needs Block surplus balance and the development of new additional specialist places.

Date (s) of any Previous Discussion at the Forum

This report provides an update on reports that were presented to the Schools Forum on 9 March (updated position statement SEND places) and 18 May (High Needs Block surplus balance and capital settlements).

Background / Context

The Forum resolved on 12 January that, “a working group of Forum members be established to discuss further the allocation / retention of the High Needs Block brought forward balance that is forecasted to be held at 31 March 2022.” A report on the working group’s discussions was presented to the Forum on 18 May (Document OM). This report also advised the Forum on the wider discussions that the Authority has had with the ESFA regarding our High Needs Block.

The Authority presented the annual SEND Sufficiency Statement to the Schools Forum on 8 December 2021. An update of this statement was presented on 9 March 2022. This statement outlined the Authority’s plan to establish between 200 and 240 additional specialist places within the academic years 2022/23 and 2023/24, but also explained the obstacles that the Authority currently faces in the delivery of these places. On 9 March, the Authority also informed the Forum of the details of the DfE’s SEND and Basic Needs capital settlements and that the DfE is set to open a new wave of SEND free schools.

Details of the Item for Consideration

High Needs Block Surplus Balance

In the report presented to the Schools Forum on 18 May, the Authority explained the discussions that have taken place within the Forum’s working group, and the areas for further exploration for investment that have been identified. The 3 areas for further exploration are: SEND teaching support services, SEND Inclusion support and non-statutory Alternative Provision support. The Authority explained the rationale for the retention at this time of the majority of the surplus balance (of at least £15m out of the estimated £21.7m), as well as the rationale for not seeking to use the balance to further increase EHCP top-up funding, nor element 2 additional funding support for mainstream provisions. The Authority explained that options for the use of the balance will be determined by further guidance, which is being sought from the ESFA, on what funding approaches are permitted by the Regulations. The Authority also explained that DSG funding cannot be spent on the Authority’s statutory assessment functions.

In response to the report, as recorded in the minutes of the 18 May meeting, the Forum requested that the Authority presents a plan for the use of the balance to the 6 July meeting. The Assistant Director explained that the Authority will seek to respond to this request, but that timescales are short. He emphasised that some of this work is also conditional on receiving advice from the ESFA on the use of High Needs Block funds.

Since the 18 May Forum meeting:

- As reported in Document OO, the value of surplus balance held within the High Needs Block at 31 March 2022 has been confirmed at £23.021m. This is £1.282m greater than the £21.739m that was estimated. Although the High Heeds Block surplus has increased on estimates, within this position there is significant additional growth in the cost of placements in out of authority, non-maintained and independent provisions. Our spend in 2021/22 increased by £3.478m (by a third) on 2020/21, which knocks into the 2022/23 budget and also worsens our 3-5-year High Needs Block forecast.
- We have updated our 3-5-year High Needs Block forecast. Whilst still significantly estimated, assuming the continuation of current growth rates in the short term, this forecast indicates a much more challenging 2023/24 High Needs Block financial position than was estimated in January. We currently estimate that the 2023/24 High Needs Block, without further amendment, may overspend by in the region of £7m, even

Details of the Item for Consideration

after exercising restraint in the uplift of EHCP top-up funding, with this negative position accelerating in 2024/25. Whilst this position is significantly estimated, and is likely to alter as growth data is refined and as the 2023/24 DSG settlement is confirmed, there continues to be underlying significant growth in the numbers of EHCPs and in the cost of placements. For example, the number of funded EHCPs in mainstream schools and academies in June 2022 was 14% higher than in June 2021. For example, the annual cost of placements in special schools and in special school academies increased in June 2022 vs. May 2022 by £0.50m, due to the addition of further banded model 'stacking'. This growth in spend does very much contribute to supporting the needs of children and young people, but has cost implications.

Whilst the Forum has expressed its frustration at the pace of development of a plan for the release of a proportion of the High Needs Block surplus balance, it is the Authority's view, more so now that presented on 18 May, that we must exercise caution at this time in taking decisions about the substantial use of the High Needs Block balance, when this balance may be critical to our financial position going forward.

- We have received further advice from the ESFA about how the High Needs Block balance can be used. This advice was received in relation to the option for the release of a proportion of the balance to mainstream primary and secondary schools and academies, in support of strengthening universal behaviour provision and the prevention of permanent exclusions, as well as early intervention to achieve the de-escalation of growth in needs, especially around behaviour.

The ESFA has advised that, where we wish to delegate additional monies to mainstream schools and academies, to ' earmark' this for behaviour support, we can only do this through the Schools Block funding formula. Given that we are considering only a one-off injection of monies, at a time when the restrictions on the Schools Block are increasing with the movement to the hard National Funding Formula, the ESFA's advice is that this will require a 'disapplication' submission to request permission from the Secretary of State to allocate one-off monies by formula. We will need to evidence that we have the approval of the Schools Forum and have fully consulted with schools and academies. As such, this is an option to be considered for the 2023/24 formula funding cycle, which begins in autumn, rather than an option available for the immediate release of funding. If agreed, we would seek the DfE's permission to add a one-off allocation into our 2023/24 Schools Block funding formula. It will then be important for the Authority to set out for schools and academies how this additional funding should be used.

This approach to the delegation of funding however, does not guarantee that schools and academies will use the funding for the purpose intended. The funding will not be ring-fenced. The ESFA's advice is that the permitted way to pass ring-fenced High Needs Block funding to schools and academies is to devolve this funding to an individual school / academy, or to a group or cluster of schools / academies, under SLA, meaning that this funding must be spent on the prescribed activity and would be recovered by the Authority if not. In these circumstances, the Authority continues to be the owner of the funding, as it would where the Authority directly commissions provision. This advice is important generally in guiding our appropriate use of the balance, but is most important perhaps in considering how any funding would be used to support early intervention (non-statutory) behaviour and alternative provision. The mechanisms here – delegation, devolution, Authority's direct commissioning – and how and to who, require further consideration. But also, perhaps most critically, the value of budget that would be available also requires further consideration, especially in the context of what is explained above regarding the worsening High Needs Block forecast.

- The DfE has made available a series of publications, which are aimed at immediately improving the efficient and sustainable use of High Needs Block funding by local authorities, recognising that the SEND review is a longer-term programme and its reforms will take time to deliver. These publications contain many recommendations and case studies, which we will consider closely. One of the strong recommendation from the DfE is that authorities now focus on targeting their investment at strengthening inclusion. This is an aspect of use of the High Needs Block balance that we have already identified with the Forum's working group, and it is the aspect that the Authority now wishes to immediately focus on.

The Authority plans therefore, to begin additional investment on inclusion. The estimated value of this investment, initially for the 2022/23 academic year, is £920,000:

- £491,000 investment, to retain the Authority's mainstream SEMH / behaviour teaching support service as free at the point of access. The majority of our schools and academies use this service. This service was previously traded, but over the COVID-19 pandemic period was provided free of charge. The service

Details of the Item for Consideration

- £240,000 investment, so that our special schools and special school academies can release specialist staff to provide expert outreach support to mainstream schools and academies. This will be additional

Recommendations

Recommended - The Schools Forum is asked to consider and to note the update provided.

List of Supporting Appendices / Papers (where applicable)

None

Contact Officer (name, telephone number and email address)

Niall Devlin, Assistant Director SEND and Inclusion
01274 431356
Niall.devlin@bradford.gov.uk

Emma Hamer, Strategic Manager Intelligence and Sufficiency
01274 439535
emma.hamer@bradford.gov.uk

Places Schemes

Type of Provision	Name of School	Phase of Education	Primary Need	Current Stage	No. of Places
Resourced Provision School Led	Ilkley Grammar School	Secondary	Communication and Interaction needs including ASD	Consultation ends 6 th July 2022	12
Resourced Provision LA Led	Bingley Grammar School	Secondary	Communication and Interaction needs including ASD	Consultation period closed and Executive Approval Received.	24
Resourced Provision School Led	Confidential at this stage	Secondary	Communication and Interaction needs including ASD	Awaiting approval from the school GB	12
Resourced Provision School Led	Confidential at this stage	Secondary	Social, Emotional and Mental Health (SEMH)	Feasibility Stage	24
Resourced Provision LA Led	Confidential at this stage	Primary	Communication and Interaction needs including ASD	Feasibility Stage	12
Resourced Provision LA Led	Confidential at this stage	Primary	Social, Emotional and Mental Health (SEMH)	Consultation due to start September 2022	12
Resourced Provision LA Led	Confidential at this stage	Primary	Communication and Interaction needs including ASD	Awaiting approval from the school GB	6
Special School	Confidential at this stage	Secondary	ASD, SLD, and PMLD	Feasibility Stage	50
Special School	Confidential at this stage	Secondary	Social, Emotional and Mental Health (SEMH)	Preliminary stage	80
EYESP	Hirst Wood Nursery School	Early Years	Early Years SEND	Places available from October 2022	10
			Total		242