

Schools Forum
Wednesday, 7 December 2022 at 8.00 am

VENUE: Remote Meeting –
[Webcast library - Bradford Council Webcasting \(public-i.tv\)](#)

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 Director of Legal and Governance 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 12 OCTOBER 2022 & MATTERS ARISING

1 - 8

That the minutes of the meeting held on 12 October 2022 be signed as a correct record.

(Asad Shah – 01274 432280)

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)**

9 - 12

As presented in **Document PA**, Forum Members are asked to agree newly proposed allocations, from the 2022/23 Schools Block Growth Fund, to maintained secondary schools and to secondary academies.

Recommended –

- (1) **The Schools Forum is asked to agree to allocate a total of £614,037 from the Growth Fund in 2022/23 to maintained secondary schools and secondary academies, as set out in Document PA. ***
- (2) **Members are asked to note that an indicative total sum of £1,296,284 of surplus balance of Growth Fund is ring-fenced and is forecasted to be carried forward into 2023/24 within the Schools Block. The Schools Forum will be asked to consider the allocation and / or retention of this balance at the meeting on 11 January. ***

** Please note that 3 of the secondary-phase allocations are currently estimated (as indicated), as the October Census numbers have not yet been released to the Authority by the ESFA. The updated spending reports to be presented to the Schools Forum on 11 January will confirm these allocations and the total Growth Fund spend and balance to be carried forward.*

(Jonty Holden – 01274 431927)

6. **EARLY YEARS BLOCK SETTLEMENT & EYSFF CONSULTATION 2023/24 (i)**

13 - 16

The Business Advisor (Schools) will present a report, **Document PB**, which provides an update on Early Years Block formula funding matters.

We had anticipated that the DfE would by now have announced the Early Years Block settlement, and formula funding arrangements, for the 2023/24 financial year, enabling us to present to this Forum meeting our consultation document on proposals for the 2023/24 Early Years Single Funding Formula (EYSFF). However, these announcements have not been made. Indicatively, these are now anticipated for either later in December or in January.

We hope to be able to present a consultation document to the Forum's meeting to be held on 11 January, though we are not certain of this. In any case, our period of consultation on the 2023/24 EYSFF will need to extend beyond the 11 January (the meeting at which the Schools Forum makes its recommendations on the 2023/24 DSG and formula funding arrangements). As we have done in the last couple of years therefore, we anticipate presenting to the Forum on 11 January a planned Early Years Block budget for 2023/24, which will be based on assumptions and estimates that are made prior to the completion of our consultation.

Recommended –

Members are asked to consider and to note the information presented in the report.

(Andrew Redding – 01274 432678)

7. CONSULTATION OUTCOMES - SCHOOLS BLOCK FORMULA FUNDING 2023/24 (i) 17 - 18

The Principal Finance Officer (Schools) will present a report, **Document PC**, which asks Members to consider the feedback received to the consultation on our 2023/24 Schools Block formula funding arrangements and Schools Block centrally managed funds.

Recommended –

- (1) The Forum is asked to consider the responses received to the consultation and whether any of the proposals on the 2023/24 primary and secondary mainstream funding formulae, or Schools Block centrally funds and criteria, should be changed in the light of these responses.**
- (2) Members are asked to note that they will be asked to make final recommendations on the Schools Block formulae, and the criteria for the allocation of Schools Block central funds, on 11 January. As such, Members are asked to consider whether sufficient information has now been provided to enable these recommendations to be made.**

(Jonty Holden – 01274 431927)

8. INDICATIVE BUDGETS 2023/24 PRIMARY & SECONDARY SCHOOLS AND ACADEMIES (i) 19 - 28

The Principal Finance Officer (Schools) will present a report, **Document PD**, which provides Members with updated indicative modelling of mainstream Primary & Secondary formula funding delegated budget shares for 2023/24, now using the pupil numbers

taken from the October 2022 Census. This modelling is tabled only for information at this stage, prior to asking Members to make final recommendations on 11 January.

Recommended –

- (1) **The Forum is asked to note the Primary and Secondary modelling information. A further update will be provided on 11 January, when Forum Members will be asked to make final recommendations on the values of funding allocated via each formula factor.**
- (2) **Members are asked to consider whether sufficient information has been provided to enable final recommendations to be taken on 11 January on the matters presented in this report.**

(Jonty Holden – 01274 431927)

9. CONSULTATION OUTCOMES - HIGH NEEDS BLOCK FORMULA FUNDING 2023/24 (i) 29 - 34

The Principal Finance Officer (Schools) will present a report, **Document PE**, which asks Forum Members to consider the feedback received to the consultation on the 2023/24 High Needs Funding Model.

Recommended –

- (1) **The Forum is asked to consider the responses received to the consultation and whether any of the proposals on the 2023/24 high needs funding formulae, should be changed in the light of these responses.**
- (2) **Members are asked to note that they will be asked to make final recommendations on High Needs Block formula funding on 11 January. As such, Members are asked to consider whether sufficient information has now been provided to enable these recommendations to be made.**

(Dawn Haigh – 01274 433775)

10. 2023/24 DSG UPDATE (i) 35 - 40

The Business Advisor (Schools) will present a report, **Document PF**, which provides a summary-level indicative forecast of the Dedicated Schools Grant (DSG) income / expenditure position for the 2023/24 financial year.

Recommended –

Members are asked to consider the information presented in the report, for reference, in advance of the 11 January meeting.

(Andrew Redding – 01274 432678)

11. 2022/23 DSG SPENDING AND CARRY FORWARD BALANCES FORECAST (i) 41 - 52

The Business Advisor (Schools) will present a report, **Document PG**, which updates Members on the forecasted spending positions of each of the DSG Blocks against the 2022/23 planned budget. This document gives Members a view of the estimated values of balances to be carried forward into 2023/24 and a view of the uses of these balances.

Recommended –

Members are asked to consider whether sufficient information has been provided to enable final recommendations to be made at the meeting on 11 January on the allocation and / or retention of estimated DSG balances.

(Andrew Redding – 01274 432678)

12. ANNUAL SEND PLACES SUFFICIENCY STATEMENT (i) 53 - 64

The Strategic Manager, Intelligence and Sufficiency will present a report, **Document PH**, which is the annual statement to the Schools Forum on the sufficiency of specialist places for SEND.

This statement is presented as per the schedule of high needs information, which was agreed with the Schools Forum on 14 October 2020. It is presented in advance on an update of the fuller DSG Management Plan, which will be presented on 11 January.

Recommended –

Members are asked to consider and to note the information presented in the report, in advance of the 11 January meeting.

(Emma Hamer – 01274 439535)

13. CENTRAL SCHOOLS SERVICES, EARLY YEARS & SCHOOLS BLOCK FUNDS (i) 65 - 86

The Business Advisor (Schools) will present a report, **Document PI**, which asks Forum Members to further consider the Authority's proposals for retention of Schools, Central Schools Services and Early Years Block central and de-delegated items in the 2023/24 financial

year, following the initial discussion had in the last Forum meeting and in advance of the 11 January.

Recommended –

- (1) Members are asked to note the information provided in the report.**
- (2) Members are asked to consider whether any further information is needed to enable final recommendations and decisions to be taken / made on 11 January on the funding of centrally managed and de-delegated Early Years, Schools and Central Schools Services Block items in 2023/24.**

(Andrew Redding – 01274 432678)

14. 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.

15. ANY OTHER BUSINESS / FUTURE AGENDA ITEMS

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

16. DATE OF NEXT MEETING

Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 11 January (City Hall).

A provisional meeting is scheduled for Wednesday 18 January (if this is needed to complete 2023/24 DSG recommendations).

For planning purposes, the provisional schedule for Schools Forum meetings for the 2023/24 academic year has now been set, as follows:

- **Wednesday 13 September 2023, 8am**

- **Wednesday 11 October 2023, 8am**
- **Wednesday 6 December 2023, 8am**
- **Wednesday 10 January 2024, 8am**
- Wednesday 17 January 2024, 8am *Provisional Meeting*
- **Wednesday 6 March 2024, 8am**
- **Wednesday 22 May 2024, 8am**
- **Wednesday 10 July 2024, 8am**

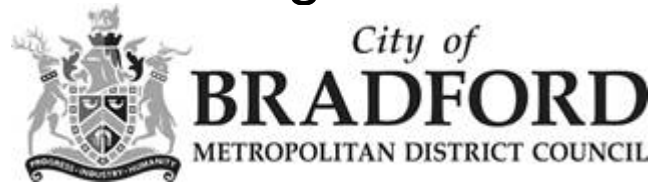
(a)	<i>Denotes an item for action (including where a formal view or recommendation is required).</i>
(i)	<i>Denotes an item for information.</i>

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->

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Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 7 December 2022

Schools Forum meeting held at City Hall on Wednesday 12 October 2022

Commenced 08:05
Concluded 10:20

RECORD OF MEETING ATTENDEES, APOLOGIES AND ABSENCES

Schools & Academies Members

IN ATTENDANCE

Member	Membership Group
Ian Morrel (Chair)	Maintained Secondary Schools – Headteacher
Ashley Reed (Vice Chair)	Academies Member
Heather Lacey	Academies Member
Wahid Zaman	Academies Member
Amanda Slaney	Academies Member
Mathew Atkinson	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Sian Hudson	Maintained Nursery Schools – Headteacher
Emma Hamer	Maintained Primary Schools – Governor
Kathryn Swales	Maintained Primary Schools - Headteacher
Jonathan Nixon	Maintained Primary Schools - Headteacher
Graham Swinbourne	Maintained Primary Schools - Headteacher

APOLOGIES RECEIVED

Member	Membership Group
Helen Williams	Academies Member
Brent Fitzpatrick OBE	Academies Member
Victoria Birch	Academies Member
Michelle Farr	Academies Member – Special School Academies
Bev George	Maintained Nursery Schools – Governor
Nicky Kilvington	Maintained Primary Schools - Headteacher
Lyndsey Brown	Maintained Special Schools - Headteacher

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Andrew Morley	Academies Member
Michael Thorp	Academies Member
Melanie Saville	Academies Member
Kirsty Ratcliffe	Pupil Referral Unit (maintained)

Non-Schools Members

IN ATTENDANCE

Member	Membership Group
Tom Bright	Teaching Unions

APOLOGIES RECEIVED

Member	Membership Group

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Junaid Karim	Council for Mosques (Bradford)
David Johnston	Officer Representing Vulnerable Children

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

Substitute Member	Membership Group
Alison Kaye	Academies Member

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

Substitute Member	Membership Group

Local Authority Officers present at the meeting

Officer	Position
Niall Devlin	Assistant Director, SEND and Inclusion
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 52% of members present (14 out of 27 currently filled membership positions).

630. DISCLOSURES OF INTEREST

Emma Hamer and Ian Morrel declared interests for agenda items 6, 7 and 8.

631. MINUTES OF 18 MAY 2022 & MATTERS ARISING

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

632. MATTERS RAISED BY SCHOOLS

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

633. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS

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

634. CONSULTATION – PRIMARY AND SECONDARY MAINSTREAM FORMULAE & SCHOOLS BLOCK MATTERS 2023/24

The Principal Finance Officer (Schools) presented a report, **Document OX**, which asked the Schools Forum to consider the consultation document, which outlines the Authority's proposals for the Schools Block, the funding formula to be used to calculate allocations for mainstream Primary and Secondary schools and academies for the 2023/24 financial year, and the criteria that will form the basis of the allocation of additional funding to maintained schools (and to academies where appropriate) from Schools Block centrally managed funds.

The Principal Officer explained that the Authority would like now to consult on these proposals, with the feedback to be presented to the Schools Forum on 7 December. The Forum will then be asked to give it final formal views (its recommendations) on 11 January 2023.

Following the presentation of the report:

- A member representing maintained primary school headteachers asked whether the Authority has information that can be reported on the number of schools that will fall into deficit as a result of increasing costs. The member explained that they are interested in trends in the growth of the number of schools with deficit budgets. The Principal Officer responded that the Authority (School Funding Team) has very recently published some information (key messages) and modelling for schools, which will support the immediate review of their current year and 3-year budget projections. The Authority does not yet have sight of the updated budget positions of schools following this review and therefore, does not yet have sight of the number of maintained schools that are newly forecasting that they will fall into deficit if no mitigation action is taken. This picture will emerge as maintained schools submit their updated budget positions. The Principal Officer stated that it is anticipated that schools will face financial challenges and will have difficult decisions to take. The Authority will keep the Forum informed.
- A member representing academies asked whether the Schools Supplementary Grant could now be clawed back (as a result of the cessation of the National Insurance Levy). The Principal Officer responded that the position here was not currently clear and that the Authority is specifically concerned that the 2023/24 settlement, which was announced in July and on which the consultation modelling and proposals that are presented today have been calculated, could be changed (could be reduced to remove the

proportion of the Supplementary Grant that related to supporting the National Insurance Levy). There is some information that indicates that the Treasury is planning to remove from April 2023 from the DfE's departmental budget the £300m that was allocated nationally for the Levy. For school funding, the critical consideration here is whether the DfE amends the 2023/24 settlement to compensate for this.

- A member representing maintained primary headteachers asked whether most schools gain from the proposed change to Notional SEND. The Principal Officer clarified that there is no material loss or gain in funding as a result of the proposed change, as this is a 'notional' figure within formula funding allocations that are governed by the National Funding Formula. The Chair, as well as an academies member, emphasised this - that a change in the definition of Notional SEND does not change the formula funding that a school or academy materially receives. They added that schools / academies will need to renew their analysis of their uses of their Notional SEND budgets should the changes be implemented.
- The member representing the teacher trades unions asked whether we expect a response from every school and whether the number of responses per school to the consultation is limited. The Principal Officer responded to explain that, although responses are voluntary, we would wish to encourage all schools and academies to respond. The introduction of an electronic responses platform will help to maximise the number of responses we receive. Schools are typically only expected to submit a single response, but could submit further responses should these include additional information or feedback that was not included in the original response.

Resolved – That the Consultation - Primary and Secondary Mainstream Formulae & Schools Block Matters 2023/24 (Document OX Appendix 1) - be published.

LEAD: *Principal Finance Officer, Schools*

635. CONSULTATION – HIGH NEEDS BLOCK FORMULAE FUNDING 2023/24

The Principal Finance Officer (Schools) presented a report, **Document OY**, which asked the Schools Forum to consider the consultation document, which outlines the formula approach that the Authority proposes to use to delegate High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2023/24 financial year April 2023 to March 2024.

The Principal Officer explained that the Authority would like now to consult on these proposals, with the feedback to be presented to the Schools Forum on 7 December. The Forum will then be asked to give its final formal views (its recommendations) on 11 January 2023.

Following the presentation of the report:

- A member representing maintained primary school headteachers expressed concern that not uplifting EHCP top-up funding for the full impact of pay award

will increase the budgetary pressure that schools face. The member asked whether the High Needs Block surplus should be used to address this. The Chair responded that the Authority has presented plans for the use and retention of the surplus balance, and emphasised that spending within the High Needs Block must be sustainable.

- A member asked whether there are any plans in place, in case the government claws back the High Needs Block surplus. The Assistant Director, SEND and Inclusion, responded that there is no expectation that the surplus balance will be clawed back.
- In responding to the proposals regarding the SEND Funding Floor, an academies member asked what is meant by a “minority” of schools. The Assistant Director responded to explain, in essence, this would be fewer than 50% of schools. Members discussed the implications of this definition, and the relationship between the SEND Funding Floor and Notional SEND, and the impact of parental preference of the distribution of EHCPs between schools / academies. Members requested some further modelling, which illustrates the impact of the proposed amendment to the SEND Funding Floor % thresholds on the numbers and types of schools / academies that qualify and how this would change.
- A member asked about the processes for assessing children and young people for EHCPs, commenting that the administrative process is costly and time intensive. Could the monies used for this instead be given to schools (without EHCP assessment). The Assessment Director responded to explain that EHCP assessment is the primary route for defining the needs of pupils and the funding that supports these needs. The EHCP assessment team in Bradford is relatively small and is funded from Council base budget, not from the DSG. The member responded to comment that the size of assessment team in Bradford needs to be increased.

Resolved – That the Consultation - High Needs Block Formulae Funding 2023/24 (Document OY Appendix 1) be published.

LEAD: *Principal Finance Officer, Schools*

636. EARLY YEARS BLOCK FUNDING MATTERS 2023/24

The Principal Finance Officer provided an update verbally on Early Years Block funding matters. They explained that no further announcements, since the 14 September Forum meeting, have been made by the DfE regarding the 2023/24 Early Years Block settlement or Early Years Single Funding Formula (EYSFF) arrangements, and that the Early Years Working Group will meet shortly to consider the development of our proposals.

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

Resolved – That the information provided be noted.

637. DSG CENTRAL ITEMS AND DE-DELEGATED FUNDS 2023/24

The Principal Finance Officers (Schools) together presented a report, **Document OZ**, which asked the Schools Forum to review the position of Central Schools Services Block, Schools Block and Early Years Block central funds and de-delegated items for the 2023/24 financial year.

The Principal Officers explained that the report is presented to initiate the Forum's consideration of centrally managed funds for the next financial year. Feedback on Schools Block funds, including de-delegation, will be collected within the consultation and will be presented back to the Forum in December. Further information, which has been previously requested by the Forum, on the School Improvement Monitoring and Brokering Grant (SIMB) and the Authority's school improvement programme, will also be presented in December. However, due to timescales for subscription, Members representing Maintained Primary Schools are asked to decide at this meeting on de-delegation in 2023/24 for the purposes of purchasing Fischer Family Trust software.

Following the presentation of the report:

- The 4 voting Members that were present at the meeting (with 1 voting member absent), representing maintained primary school headteachers, voted to de-delegate from the primary phase for the purpose of subscribing to Fischer Family Trust for the 2023/24 financial year.
- In doing so, the Members requested that the Authority communicates again with maintained primary schools, to ensure that all schools are aware that the FFT software has been purchased and is available. Members also requested that the Authority approaches FFT with the aim of providing more training for schools (rather than just a roadshow).

Resolved –

- (1) That the information presented in Document OZ be noted**
- (2) Schools Forum Members did not request at this time the review of any of the centrally managed funds presented in Document OZ.**
- (3) Members representing Maintained Primary Schools decided to de-delegate in 2023/24 for the purposes of purchasing subscriptions to Fischer Family Trust.**

LEAD: BUSINESS ADVISOR (SCHOOLS)

638. AOB / FUTURE AGENDA ITEMS

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

639. DATE OF NEXT MEETING

The next scheduled is Wednesday 7 December. This meeting will be held remotely.

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

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SCHOOLS FORUM AGENDA ITEM

For Action

For Information

Brief Description of Item

Forum members are asked to agree newly proposed allocations, from the 2022/23 Schools Block Growth Fund, to maintained secondary schools and to secondary academies.

Date (s) of any Previous Discussion at the Forum

The criteria for funding expanding schools and bulge classes were included as part of the consultation on 2022/23 Primary and Secondary mainstream funding and were agreed by Forum members prior to submission of our final Schools Block pro-forma to the ESFA in January 2022.

Background / Context

The Schools and Early Years Finance (England) Regulations allow for a Growth Fund to be held and managed centrally within the Schools Block of the DSG.

The Regulations require that this fund is:

- ring-fenced i.e. cannot be spent on any other purpose. Any unspent growth funding remaining at the financial year-end should be reported to the Schools Forum. Funding may be carried forward to the following funding period, and can be used again specifically for growth if the Authority wishes.
- available to be accessed by both maintained schools and academies across the District (with both maintained school and recoupment academy budgets contributing to the cost of this fund).

The Regulations require that local authorities consult their Schools Forum before incurring any expenditure from the Growth Fund.

The criteria and mechanisms for allocating funding from the Growth Fund in Bradford in 2022/23 were agreed by Forum members following the consultation held in October - November 2021, and were part of our final Schools Block APT (pro-forma) submitted to the ESFA in January 2022.

Primary Phase Growth Fund Allocations Criteria 2022/23

The criteria and mechanisms agreed for allocating growth funding to primary schools and to primary academies in 2022/23 are the same as used in 2021/22 and are, in summary:

- Where a school / academy is expanding or is admitting a bulge class for the first time in September 2022, the school / academy is allocated 80% of the value of the 2022/23 base amount per pupil for the additional planned intake number, for the remaining proportion of the year i.e. $80\% \times \text{£Base APP} \times \text{additional planned intake number} \times 7/12$. In the following financial year, funding is then allocated as follows:
 - A permanently expanding school / academy would receive funding calculated on the difference between the October Census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers, based on an estimate of the following year September intake. The school / academy will then be allocated 80% of the value of the additional base amount per pupil, for the additional number of calculated pupils.
 - No additional funding is necessary or allocated for a school / academy that has a bulge class of 30 pupils from the previous year; this additional class is automatically funded within the normal budget as the full class will be included in the October Census.
 - Additional funding is allocated, however, for a school / academy that has a half bulge class in each year for the lifetime that half class is at the school / academy. An additional sum is allocated based on 80% of the value of the base amount per pupil for the difference between 30 and the actual number of children in the half class. E.g. For an existing half class of 15 pupils the funding would be calculated as $(30-15) \times \text{£Base APP} \times 80\%$.

Background / Context

Secondary Phase Growth Fund Allocations Criteria 2022/23

The criteria and mechanisms agreed for allocating growth funding to secondary schools and to secondary academies in 2022/23 are the same as used in 2021/22 and are, in summary:

For secondary schools / academies, that are permanently or temporarily increasing PAN, eligibility for growth funding is assessed on the following principles and criteria:

- The school or academy must have admitted additional pupils (either via a permanent expansion or via a one off bulge class) at the request of the Local Authority to meet basic-need sufficiency and only numbers associated with basic need sufficiency will be eligible for funding.
- The request for additional places from the Authority has come within the normal admissions round and relates to the school's year 7 intake i.e. pupils admitted at other times in year, admissions to year groups other than year 7, or pupils admitted on appeal or under the Fair Access Protocol, are not funded by the Growth Fund. Consideration of additional funding in these circumstances would be picked up by the exceptional pressures / schools in financial difficulty fund for maintained schools only.
- Funding is calculated on actual numbers and allocated only once actual October Census numbers are confirmed (so for additional pupils in September 2022, funding will be calculated and allocated on the basis of the additional costs associated with the actual number of additional pupils recorded in the October 2022 Census).
- Funding is allocated after an assessment of the actual cost implications of the additional pupils on the school's budget for the lifetime of the process of expansion e.g. in admitting additional pupils the school evidences that it must incur additional costs in year and that these costs are commensurate with the value of additional funding that would be allocated. This assessment would be carried out at the time of the initial discussion / consultation between the Local Authority and the school or academy, and would take the form of a budget discussion with the headteacher and business manager.

Funding for eligible secondary schools and secondary academies will be calculated as follows:

- Where a secondary school or academy is permanently expanding by increasing the size of its year 7 for the first time in September 2022, the school / academy is allocated 80% of the value of the Key Stage 3 base amount per pupil for the additional planned intake number, for the applicable proportion of the year (for September expansions this is 7/12ths). Funding will be physically allocated in-year.*
- Where an established secondary school or academy is permanently expanding by increasing the size of existing year groups, and has already begun to expand before the start of the financial year, funding is calculated on the difference between the October 2021 Census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers incorporating the school's October 2022 Census numbers. The school will then be allocated 80% of the value of the Key Stage 3 base amount per pupil for the difference between the actual and the composite calculation. At the point the school's expansion reaches Key Stage 4, 80% of the Key Stage 4 base £app will be used.*
- Where a secondary school or academy has been asked to take a year 7 bulge class (one off temporary PAN increase) of any size, funding is allocated on the same basis as for new permanently expanding schools above; at 80% of the Key Stage 3 base amount per pupil value for the planned additional admission number for the relevant proportion of the financial year. This is a one off allocation. In the following financial year, no additional funding is allocated; this additional class is automatically funded within the school's / academy's normal revenue budget.*

* Please note that, due to the fluidity within forecasts of September 2022 pupil numbers in the secondary phase and in the numbers of additional pupils that will be admitted, all Growth Fund allocations to secondary schools and secondary academies (both new and existing expansions) for the 2022/23 year will be checked against actual October 2022 Census numbers before being confirmed.

This report asks Forum members to consider allocations from the 2022/23 Schools Block Growth Fund, now proposed as follows.

Please note that there are no proposed allocations to the primary phase.

Details of the Item for Consideration

- **Appleton Academy** (bulge class intake) + 8 pupils at October 2022, resulting in an allocation of **£16,937** for the period September 2022 – March 2023 (total of £29,035 for the 2022/23 academic year).
- **Bingley Grammar School** (bulge class intake) + 29 pupils at October 2022, resulting in an allocation of **£69,193** for the period September 2022 – March 2023 (maintained school).
- **Bradford Girls Grammar School** (existing expansion) + 24 pupils at October 2022, resulting in an allocation of **£50,811** for the period September 2022 – March 2023 (total of £87,105 for the 2022/23 AY).
- **Buttershaw Business & Enterprise College** (existing expansion) + 23 pupils at October 2022, resulting in an allocation of **£48,694** for the period Sept 2022 – March 2023 (total of £83,476 for the 2022/23 AY).
- **Dixons City Academy** (existing expansion) + 20 pupils at October 2022, resulting in an allocation of **£42,343** for the period September 2022 – March 2023 (total of £72,588 for the 2022/23 academic year).
- **Dixons McMillan Academy** (existing expansion) **ESTIMATED** + 21 pupils at Oct 2022, resulting in an allocation of **£44,460** for the Sept 2022 – March 2023 (total of £76,217 for the 2022/23 academic year).
- **Dixons Trinity Academy** (existing expansion) + 16 pupils at October 2022, resulting in an allocation of **£33,874** for the period September 2022 – March 2023 (total of £58,070 for the 2022/23 academic year).
- **Ilkley Grammar School** (existing expansion) + 35 pupils at October 2022, resulting in an allocation of **£83,509** for the period September 2022 – March 203 (total of £143,159 for the 2022/23 academic year).
- **Immanuel College** (existing expansion) **ESTIMATED** + 69 pupils at October 2022, resulting in an allocation of **£164,633** for the period September 2022 – March 2023 (total of £282,228 for the 2022/23 academic year).
- **Trinity Academy Bradford** (bulge class intake) **ESTIMATED** + 18 pupils at October 2022, resulting in an allocation of **£38,108** for the period September 2022 – March 2023 (total of £65,329 for the 2022/23 academic year).
- **Titus Salt School** (existing expansion) + 9 pupils at October 2022, resulting in an allocation of **£21,474** for the period September 2022 – March 2023 (maintained school).

The total value of these 11 allocations is **£614,037**. Please note that 3 of these allocations are currently estimated (as indicated), as the October Census numbers have not yet been released to the Authority by the ESFA. The updated spending reports to be presented to the Schools Forum on 11 January will confirm these allocations.

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

The Forum set aside from the 2022/23 Schools Block budget the following Growth Fund values to be available to be allocated in support of new growth and adjustments during 2022/23:

- Primary £0
- Secondary £859,200
- Total £859,200

In addition to the £859,200 taken from the 2022/23 Schools Block, the Forum carried forward from the 2021/22 financial year a figure of £1,051,121 of uncommitted Growth Fund balance.

The total cost of the 11 allocations set out above for the Secondary phase is £614,037 and so the Secondary phase Growth Fund provision is estimated to under spend by £245,163. No further allocations to the secondary phase are expected in 2022/23. However, the values of the 3 estimated allocations may adjust.

On this basis, in total, the total current estimated value of unspent Growth Fund balance to be carried forward into 2023/24 is £1,296,284. This balance is retained as ring-fenced sum held within the Schools Block.

Recommendations

- (1) The Schools Forum is asked to agree to allocate a total of £614,037 from the Growth Fund in 2022/23 to maintained secondary schools and secondary academies, as set out in this report. *
- (2) Members are asked to note that an estimated total sum of £1,296,284 of surplus balance of Growth Fund is ring-fenced and is forecasted to be carried forward into 2023/24. * The Schools Forum will be asked to consider the allocation and / or retention of this balance at the meeting on 11 January.

* Please note that 3 of the secondary-phase allocations are currently estimated (as indicated), as the October Census numbers have not yet been released to the Authority by the ESFA. The updated spending reports to be presented to the Schools Forum on 11 January will confirm these allocations and the total Growth Fund spend and balance to be carried forward.

List of Supporting Appendices / Papers

None.

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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 Early Years Block formula funding matters.

Date (s) of any Previous Discussion at the Forum

A report outlining key matters and emerging themes for discussion regarding 2023/24 early years entitlement funding arrangements was presented to the Schools Forum on 14 September 2022 (Document OS).

Background

We reported in the Forum's September and October meetings that the final details of the Early Years Block settlement, and operational guidance, for 2023/24 were not yet known. We explained that the DfE had however, recently (in September) concluded a national consultation on Early Years Block funding, and we set out the main proposals, and key concerns that we have, in relation to this consultation. We refer members to Document OS, presented on 14 September, in which we set out the key considerations behind the development of EYSFF proposals, and Early Years Block management, for the 2023/24 financial year.

We had anticipated that the DfE would by now have announced the Early Years Block settlement, and formula funding arrangements, for 2023/24, enabling us to present to this Forum meeting our consultation document on proposals for the Early Years Single Funding Formula (EYSFF). However, these announcements have not been made. Indicatively, these are now anticipated for either later in December or in January. We hope to be able to present a consultation document to the Forum's meeting to be held on 11 January, though we are not certain of this. In any case, our period of consultation on the 2023/24 EYSFF will need to extend beyond the 11 January (the meeting at which the Schools Forum makes its recommendations on the 2023/24 DSG and formula funding arrangements). As we have done in the last couple of years therefore, we anticipate presenting to the Forum on 11 January a planned Early Years Block budget for 2023/24, which will be based on assumptions and estimates that are made prior to the completion of our consultation.

We have updated benchmarking of our Early Years Single Funding Formula (EYSFF), now using 2022/23 financial year information. Updated comparisons with other local authorities will be presented within the consultation document and are summarised later in this report.

It is helpful to quickly remind Forum members of our recent considerations and actions relating to our Early Years Single Funding Formula:

- In 2020/21, we 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 intention to reduce this over 3 years from 9.5% to the average of our statistical neighbours, rounded up to 6%, in support of affordability and of maximising our Universal Base Rates, having also identified that we are currently spending a higher proportion of our EYSFF on this supplement than other authorities are. 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 and we retained 8% in 2022/23. The current Regulations place a restriction on the use of supplements in the 3&4-year-old EYSFF; supplements cannot allocate more than 10% of EYSFF funding.
- As a consequence of the retention at 8%, in part, we have continued to allocate reserves (one off monies from brought forward balances) held within the Early Years Block to protect the values of the 2-year-old and 3&4-year-old Universal Base Rates at their current year levels of £5.55 and £4.39 per hour. The 2022/23 planned budget incorporated £0.734m of reserves and we held £4.18m of reserves in total within the Early Years Block at the end of 2021/22. We have identified that we must continue to discuss how our EYSFF arrangements can most effectively, but sustainably, support the early years sector in its delivery of the entitlements going forward, recognising that reserves can only be spent once.
- In 2022/23, Bradford's rate of funding from the DfE for the 3&4-year-old entitlements increased from £4.69 to £4.86 per hour. This represented an increase of + 3.62% (+ £0.17). £0.15 of this increase was passed directly through to providers (£0.14 through the Universal Base Rate and £0.01 through the Deprivation and SEND Supplement). Bradford's rate of funding for the 2-year-old entitlement increased from £5.36 to £5.57 per hour. This represented an increase of + 3.92% (+ £0.21). £0.19 of this increase was passed directly through to providers through the 2-year-old Setting Rate. £0.02 was allocated to supported the cost of continuing 2-year-old access to the Early Years SEND Inclusion Fund (EYIF).

Background (continued)

- Since April 2019, we have operated an amended Early Years Inclusion Fund (EYIF), supporting emerging SEND. The DfE has indicated within the current national SEND Review that how SEND is supported in early years will change, and that this is likely to have knock-on implications for early years entitlement funding, including for EYIF and for the Disability Access Fund (DAF).
- We have identified the critical significance of national DfE decisions concerning the continuation of the Maintained Nursery School Supplement. This Supplement has been confirmed as continuing for the current 3 year spending period (which covers up to March 2025). Following the DfE's uplift of funding rates, in 2022/23, we uplifted the sustainability lump sum protection that we allocate to our nursery schools, for the first time since 2017/18.
- We are currently introducing a new Bradford Provider Headcount Portal for providers to use to submit their entitlement delivery information to the Authority. We have signalled that, as the use of this Portal is extended, including to schools and academies in 2023/24, we will have an opportunity to consider whether our early years entitlement counting arrangements should adjust to be more responsive to changes in numbers within each term. There are pros for, and cons against, such a change in approach.

Please note that discussion on the central retention of funding within the Early Years Block is presented in Document PI.

Details of the Item for Consideration

Benchmarking of the EYSFF 2022/23

It is important that we regularly compare our Early Years Single Funding Formula (EYSFF), with other local authorities. It is also important that we review our direction of travel for 2023/24 in this context. The comparisons below are based on 2022/23 budget information, which has been published by the DfE.

The table below shows the median averages of 3&4-year-old and 2-year-old provider Universal Base Rates (UBR) for the current 2022/23 financial year.

3&4 Year Old Entitlement UBRs 2022/23	UBR £
Bradford	£4.39
Yorks & Humber Regional Average	£4.31
Statistical Neighbour Average	£4.43
National Average (including London)	£4.45
National Average (excluding London)	£4.35

2 Year Old Entitlement Base Rates 2022/23	Base Rate £
Bradford	£5.55
Yorks & Humber Regional Average	£5.51
Statistical Neighbour Average	£5.46
National Average (including London)	£5.57
National Average (excluding London)	£5.52

Additional important points of comparison:

- As in Bradford, the vast majority of local authorities continue to fund the 2-year-old entitlement using only a single flat Universal Base Rate of funding per hour, without any additional supplements.
- Approximately 2/3rds of local authorities, including Bradford, continue to set a 2-year-old Universal Base Rate, which is lower than the rate of funding for 2-year-olds that they received from the DfE within the Early Years Block i.e. 2/3rds of authorities in 2022/23 'top-sliced' the provider funding rate to use a proportion of this funding for other purposes.
- The national median average spending on Early Years SEND Inclusion Funds (EYIF), as an amount per child per hour (calculated on all entitlement children and all entitlement hours), was £0.12, compared with £0.06 in Bradford. The statistical neighbours average was closer to Bradford, at £0.06, and the Metropolitan Districts average was higher at £0.10. Approximately 1/4 of other local authorities allocated EYIF funding to 2-year-olds in 2022/23, as we do in Bradford. Spend per child per hour on EYIF is affected by the number of claims, as well as by the value of funding allocated per claim. Our comparison (our lower spend on EYIF) should be viewed in the context of our investment (from High Needs Block funding) in the Early Years Enhanced Specialist Provisions (EYESPs) that are attached to 6 maintained nursery schools. These EYESPs deliver provision for children with EHCPs as well and those that are identified with significant additional needs that are being assessed for an EHCP. In other authorities, where EYESPs are not established, these assessment children would be supported by EYIF.

Details of the Item for Consideration

- When we initially compared this position in 2018/19, the national average spending on supplements in the 3&4-year-old EYSFF was 4.4% and the average of our statistical neighbours was 5.7%. Bradford in 2022/23 spends 8.0% (excluding use of reserves and the maintained nursery school supplement). All local authorities are required to have a deprivation supplement and a small number of authorities also used other permitted supplements, such as a quality supplement. It is a little difficult to update this % calculation for 2022/23, because of the way supplement spending information is now presented within national benchmarking statistics. It is difficult to clearly see the proportion of 3&4-year-old funding that is allocated on supplements, without the inclusion of the maintained nursery school supplement, which will have a distorting impact on the figures because this supplement is not present in all authorities. With this limitation, we calculate that the national average spending on supplements in the 3&4-year-old EYSFF in 2022/23 is 4.8% and the average of our statistical neighbours is 5.6%. These %s were 4.8% and 6.3% respectively in 2021/22. These % are therefore, not significantly different from the %s we found in 2018/19. If we were to remove the maintained nursery school supplement from these calculations, on an estimated basis, the national average would be 3.4% and the statistical neighbour average would be 3.6%. However, this would not necessarily represent a fully accurate picture of deprivation supplement spending, as we would expect that a good proportion of the maintained nursery school supplement is spent on supporting deprivation. But, overall, the benchmarking continues to evidence our significantly higher spending on supplements, in addition to high / higher Universal Base Rate funding.

2023/24 EYSFF Informal Indicative Modelling

We cannot yet put forward confirmed or formal proposals for our 2023/24 EYSFF. We have however, modelled a scenario, which assumes a) that our rates of funding from the DfE increase by 1% (which is what the DfE's summer consultation proposed) and b) that the schools' Teacher Pay and Pensions Grants are merged into the EYSFF (which is also what the DfE's consultation proposed). We have incorporated:

- The requirement to adopt a new Quality Supplement, for the purpose of replicating within the 3&4-year-old EYSFF the Teacher Pay and Pensions Grants to schools / academies (for their employment of teachers). We don't have the details of this supplement yet, but we have ring-fenced the funding so that it not available to use to support the wider EYSFF.
- The critical need now to manage our higher level of spending on the Deprivation and SEND Supplement within the 3&4-year-old EYSFF, with the expectation that we will now take the previously planned (but delayed) 2nd step to reduce spending from 8% to 7%.
- Bringing back into our EYSFF calculation a proportion of the 'benefit' that comes into our Early Years Block as a result of our profile of entitlement numbers. This is explained further in Document PG.
- Our proposals for the central retention of funds, which are presented in Document PG.
- The planned extension of the new Headcount Portal to schools and academies, for the purpose of collecting entitlement delivery information, replacing the use of the DfE termly censuses, but with no change in 2023/24 to our existing termly counting arrangements.
- The retention of our existing approach to the protection of maintained nursery school funding, which protects base-rates and deprivation funding and which also incorporates a 'sustainability' formula factor.
- The continuation of our existing Early Years SEND Inclusion Fund (EYIF) arrangements.
- The continuation of our existing Disability Access Fund (DAF) arrangements.

In this scenario, informally and indicatively, the headlines for our EYSFF in 2023/24 are:

- The main 3&4-year-old Universal Base Rate increases from £4.39 to £4.44 per hour (+£0.05; +1.14%). The Maintained Nursery School protected base rate increases by the same cash value, from £5.98 to £6.03 per hour (+£0.05; +0.84%).
- The 2-year-old Universal Base Rate increases from £5.55 to £5.61 per hour (+£0.06; +1.10%).
- Incorporating estimated changes in Index of Multiple Deprivation (IMD) scores for the January 2023 Census, Deprivation and SEND Supplement funding in the 3&4-year-old EYSFF reduces by a median average of £0.04 (in classes) and £0.03 (in PVI) per hour. Existing deprivation rates of funding for Maintained Nursery Schools continue to be protected, via the Supplement.
- We will be required to deploy balances brought forward (one off monies) to ensure that we can meet the cost of our EYSFF arrangements. On current estimates, we calculate that we may need to earmark in the region of £0.95m in 2023/24.

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

A summary of the overall impact of proposals (the estimated position of the Early Years Block in 2023/24) is presented in Document PF Appendix 1 (DSG Summary).

On current estimates, we calculate that we may need initially to earmark in the region of £0.95m of brought forward balances to ensure that we meet the cost of EYSFF arrangements in 2023/24.

This indicates that we continue to 'overspend' our Early Years Block allocation and that further mitigating actions are likely to be required in future years, as the value of the surplus brought balance that we have available reduces.

Recommendations

Recommended – Members are asked to consider and to note the information presented in the report.

List of Supporting Appendices / Papers (where applicable)

None

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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 asks Forum members to consider the feedback received to the consultation on our 2023/24 Schools Block formula funding arrangements and Schools Block centrally managed funds.

Date (s) of any Previous Discussion at the Forum

The consultation document and modelling was presented to the Schools Forum meeting 12 October 2022.

Background / Context

The consultation document outlined the Authority's proposals against the key decisions that are required to set Bradford's 2023/24 financial year mainstream primary and secondary funding formula arrangements. These decisions are:

1. Whether we transfer budget from Schools Block to the High Needs Block and, if we do, the value of this transfer.
2. Whether we continue to fully mirror the DfE's National Funding Formula (NFF).
3. The value (% level) of the Minimum Funding Guarantee, which can be set between 0% and positive 0.5%.
4. Whether we continue our existing local approaches to the factors that are still not covered by the National Funding Formula.
5. In light of the DfE's new recent guidance, whether we continue our existing approach to the definition of Notional SEND budgets, or whether we now take steps to review and to incrementally adjust this definition in the movement towards the 'hard' NFF.
6. How we would amend our mainstream primary and secondary funding formula, if necessary for affordability reasons, should the total cost of our formula substantially increase (and be unaffordable) when the October 2022 Census dataset is used.
7. Whether we retain, with their existing criteria and methodologies, the funds currently managed centrally within the Schools Block.

The consultation document also set out proposals for the continuation of de-delegated and other centrally managed funds (e.g. Growth Fund). These funds are discussed in more detail in Document PI. However, responses to the consultation are presented here.

Details of the Item for Consideration

Consultation & Responses

The consultation ran between 12 October and 29 November. For the first time this year, responses could be submitted electronically via a web-based survey. It was anticipated that this would help improve the number of responses that are received.

Forum members are encouraged to present to the meeting their feedback from their discussions with colleagues.

In support of the publication of the consultation document on Bradford Schools Online, School Funding Team attended the autumn term Governor Forum, BSIP, and the Primary & Secondary Business Manager Forums.

The Authority received one formal response, submitted using the web-based survey. Of the questions answered, the respondent 'strongly agreed' with the proposals that were set out in the consultation.

In presenting to various groups, the Authority did not receive any negative comments expressed in real time specifically about the proposals themselves. Some feedback expressed concerns about the general adequacy of funding in the context of rising costs.

Forum members are asked to consider whether any of the proposals should be amended in the light of feedback and / or whether further information is required in order for the Schools Forum to make its recommendations, on 11 January 2022, on the primary & secondary mainstream formula for 2023/24.

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

As set out in Document PF (DSG update).

Recommendations

- (1) The Forum is asked to consider the responses received to the consultation and whether any of the proposals on the 2023/24 primary and secondary mainstream funding formulae, or Schools Block centrally funds and criteria, should be changed in the light of these responses.
- (2) Members are asked to note that they will be asked to make final recommendations on the Schools Block formulae, and the criteria for the allocation of Schools Block central funds, on 11 January. As such, Members are asked to consider whether sufficient information has now been provided to enable these recommendations to be made.

List of Supporting Appendices / Papers (where applicable)

None

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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 Forum members with updated indicative modelling of mainstream Primary & Secondary formula funding delegated budget shares for 2023/24, using the pupil numbers taken from the October 2022 Census. This modelling is tabled only for information at this stage, prior to asking Forum members to make final recommendations on Schools Block funding on 11 January.

Date(s) of any Previous Discussion at the Forum

The consultation on Primary and Secondary formula funding arrangements for 2023/24 was discussed at the last Forum meeting 12 October.

Background / Context

The 2023/24 consultation document incorporated modelling:

- Using estimated October 2022 Census pupil numbers, adjusted for newly establishing academies.
- Using October 2021 Census based pupil circumstances data i.e. the data (such as Free School Meals, English as an Additional Language, Income Deprivation Affecting Children Index, Low Prior Attainment) that was used to calculate actual 2022/23 allocations.
- Continuing to exactly mirror the DfE's National Funding Formula, as this exists for 2023/24, including the uplifted mandatory per pupil minimums (MFLs).
- Incorporating a positive 0.5% per pupil Minimum Funding Guarantee (MFG).
- On the basis that we continue to use our current methodologies for the factors not yet included in the National Funding Formula, such as BSF (PFI) and split sites.

Under 'Decision 6' in our consultation document, as we did this time last year, we set out the concerns we have that significant changes in pupil circumstances data between October 2022 and October 2021, such as a significant increase in the number of children recorded as eligible for Free School Meals, may affect the affordability of our proposals. We have previously discussed these concerns, and possible approaches to managing these, with the Schools Forum, and we set these out in the consultation document.

We will not have a good view of the overall affordability position until we have access to the full dataset later in December. As such, this is a matter that we will pick up with the Schools Forum on 11 January.

Details of the Item for Consideration

The modelling, attached at Appendices 1a, 1b and 1c, provides Forum members with an updated view of primary and secondary mainstream school and academy indicative (estimated) core formula funding and Pupil Premium Grant allocation totals for 2023/24, now using pupil numbers taken from the October 2022 Census. However, the census data for some academies (20) has not yet been released to the Authority. In these cases, the modelling is still based on the previous estimates of October 2022 Census pupil numbers.

For clarity, these indicative allocations for individual schools and academies have not been updated for changes in pupil circumstances data (e.g. Ever 6 FSM %, IDACI, EAL, Low Prior Attainment etc.) that will have been recorded in the October 2022 Census. The Census dataset will not be made available by the ESFA until later in December. Updated modelling will be presented to the Schools Forum on 11 January.

The modelling is based on the same assumptions and proposals that were used to construct the modelling, which accompanied the consultation document. These assumptions are listed above. The only difference is the use of October 2022 Census actual pupil numbers, where these are now available.

The factors that may result in variances in formula funding and Pupil Premium Grant allocations for individual schools and academies in 2023/24, not yet built into the modelling we present now, are:

- Final recommendations on the decisions for consideration, as set out in the consultation document e.g. the value of the Minimum Funding Guarantee, whether we need to make adjustments to our mirroring of the NFF to secure an affordable approach.
- Changes in individual setting pupil circumstances data, such as IDACI, FSM, EAL, SEN low prior attainment, as recorded in / based on the October 2022 Census.

Details of the Item for Consideration

- Pupil Premium Grant (PPG) allocations, as these allocations will be calculated on Ever 6 FSM numbers taken with reference to the pupils on roll that were recorded in the October 2022 Census. On a like-for-like basis, schools and academies that have recorded growth in their FSM numbers between October 2021 and October 2022 should see increased PPG allocations in 2023/24, alongside increased deprivation funding through the core-funding formula.
- Pupil Premium Grant (PPG) funding rates for 2023/24 are still to be announced; critically whether these rates will increase for pay award and for inflation. This is especially critical where schools and academies allocate PPG to support staffing capacity. modelling does not increase the rates on 2022/23 values.
- Growth Fund allocations for existing expanding schools and academies, which will be based on final confirmed October 2022 census numbers and the final base £app values within our 2023/24 mainstream funding formula.
- Any allocations that may come from the Falling Rolls Fund.

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

This is an item for information. As introduced above.

Recommendations

Recommended –

- (1) The Forum is asked to note the Primary and Secondary modelling information. A further update will be provided on 11 January, when Forum Members will be asked to make final recommendations on the values of funding allocated via each formula factor.**
- (2) Members are asked to consider whether sufficient information has been provided to enable final recommendations to be taken on 11 January on the matters presented in this report.**

List of Supporting Appendices / Papers (where applicable)

- Appendix 1a - Indicative Variances Analysis 2023/24 - Individual Primary School / Academy Modelling
- Appendix 1b - Indicative Variances Analysis 2023/24 - Individual Secondary School / Academy Modelling
- Appendix 1c - Indicative Variances Analysis 2023/24 - Individual All Through Schools Modelling

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Phase Notes	School	2022/23 Actuals				Total 2022/23 Actual	2023/24 Estimated - see notes below				Variances				MFG	Core Formula Funding				2023/24 Funded No.s (October 2022)
		Formula Funding (excluding rates, PFI and Split Sites)	School Supplement ary Grant	Growth Fund / Safeguarde d Salaries	Pupil Premium Grant (latest published)		Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund / Safeguarde d Salaries	ESTIMATED Pupil Premium Grant	Total 2023/24 Estimated	Formula Funding (including MFL & MFG)	Growth Fund / Safeguarded Salaries	Pupil Premium Grant	Total Variances	MFG 2023/24 (included in figures to the left)	2022/23 £app	2023/24 £app	£app Variance	Pupil Number Difference	

This analysis excludes Early Years, High Needs and Post 16 funding (it shows pre-16 mainstream Schools Block core-NFF based formula funding only).
 2022/23 Actuals use the figures included in the APT / Section 251 Budget Statements, except for the Pupil Premium Grant, which uses the latest published figures
 2023/24 Formula funding figures are now calculated on October 2022 Census pupils numbers, but still use the October 2021 Census dataset
 Pupil Premium Grant (PPG): ESTIMATES for 23/24 are still based on current confirmed 22/23 PPG FSM Ever6 data and using the following rates: £1,385 (p) and £985 (s) per eligible Ever 6 FSM pupil, £320 per eligible service child, and £2,410 per eligible Adopted from Care pupil.
 Pupil Premium Grant allocations here are significantly estimated. These also do not include any funding allocated throughout the year for children who are Looked After

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Phase	School	2022/23 Actuals				2023/24 Estimated - see notes below				Variances				MFG	Core Formula Funding					
		Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund (Apr 22-Aug 22) / School Supplement	Pupil Premium Grant (latest published)	Total 2022/23 Actual	Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund (Apr 23-Aug 23) / Safeguarded Salaries	ESTIMATED Pupil Premium Grant	Total 2023/24 Estimated	Formula Funding (including MFL & MFG)	Growth Fund / Safeguarded Salaries	Pupil Premium Grant	Total Variances		MFG 2023/24 (included in figures to the left)	2022/23 £app	2023/24 £app	£app Variance	Pupil Number Difference	2023/24 Funded No.s (October 2022 + new estab)
RECOUPMENT ACADEMY	Beckfoot Academy	7,480,850	225,594	252,675	7,959,119	7,864,968	0	237,280	8,102,248	158,524	0	-15,395	143,129	0	5,692	5,779	87	7	1,361	
RECOUPMENT ACADEMY	Beckfoot Upper Heaton Academy	4,909,861	142,028	284,173	5,336,061	5,146,303	0	288,605	5,434,908	94,415	0	4,433	98,847	217,818	7,125	7,158	32	10	719	
RECOUPMENT ACADEMY	Belle Vue Girls' Academy	5,709,809	175,316	317,663	6,202,788	5,875,522	0	309,290	6,184,812	-9,603	0	-8,373	-17,976	0	6,510	6,684	174	-25	879	
SECONDARY	Bingley Grammar School	8,705,869	267,182	334,940	9,307,990	9,329,280	0	336,150	9,665,430	356,229	0	1,210	357,439	0	5,756	5,908	153	20	1,579	
RECOUPMENT ACADEMY	Buttershaw Business & Enterprise College Academy	9,225,217	294,414	52,856	10,244,028	9,929,965	34,782	678,660	10,643,407	410,334	-18,075	7,120	399,379	0	6,625	6,801	177	23	1,460	
RECOUPMENT ACADEMY	Carlton Bolling College	10,427,730	320,507	109,203	11,502,443	10,986,660	0	644,510	11,631,170	238,422	-109,203	-493	128,726	0	6,594	6,744	150	-1	1,629	
RECOUPMENT ACADEMY	Dixons City Academy	5,324,532	161,794	20,555	5,748,981	5,748,866	30,245	254,255	6,033,365	262,539	9,690	12,155	284,384	0	6,206	6,359	153	20	904	
RECOUPMENT FREE SCH	Dixons McMillan Academy	3,809,631	118,961	24,960	4,161,214	4,161,698	31,757	215,050	4,408,505	233,106	6,797	7,388	247,290	0	6,336	6,493	156	21	641	
RECOUPMENT FREE SCH	Dixons Trinity Academy	3,785,780	116,545	30,833	4,118,337	4,096,669	24,196	190,105	4,310,969	194,344	-6,637	4,925	192,632	0	6,274	6,421	147	16	638	
RECOUPMENT ACADEMY	Bradford Forster Academy	6,833,505	212,013	0	7,528,783	7,298,744	0	489,295	7,788,039	253,226	0	6,030	259,256	0	6,955	7,142	187	9	1,022	
RECOUPMENT ACADEMY	Feversham College	3,981,893	118,504	0	4,293,897	4,056,383	0	192,955	4,249,338	-44,014	0	-545	-44,559	56,437	6,561	6,596	35	-10	615	
RECOUPMENT ACADEMY	Co-op Academy Grange	10,100,408	316,543	44,047	11,176,988	10,472,965	0	698,805	11,171,770	56,014	-44,047	-17,185	-5,218	0	6,773	6,950	176	-31	1,507	
RECOUPMENT ACADEMY	Hanson School	9,156,685	291,393	0	10,089,460	9,700,102	0	642,195	10,342,297	252,025	0	813	252,837	0	6,598	6,769	171	1	1,433	
RECOUPMENT ACADEMY	Ilkley Grammar School	8,475,350	236,770	77,766	8,910,706	8,966,835	59,650	122,150	9,148,635	254,715	-18,117	1,330	237,929	0	5,679	5,715	36	35	1,569	
RECOUPMENT ACADEMY	Immanuel College Academy	8,132,355	249,431	105,894	8,859,803	9,043,880	117,595	391,155	9,552,629	662,093	11,701	19,033	692,826	0	6,043	6,211	168	69	1,456	
RECOUPMENT FREE SCH	Dixons Kings Academy	5,122,551	157,070	0	5,532,274	5,402,959	0	252,160	5,655,119	123,337	0	-493	122,845	0	6,278	6,440	162	-2	839	
RECOUPMENT ACADEMY	Laisterdyke Leadership Academy	5,583,659	174,026	0	6,153,162	5,898,359	0	395,970	6,294,329	140,674	0	493	141,167	0	6,937	7,106	169	0	830	
RECOUPMENT ACADEMY	Beckfoot Oakbank Academy	8,673,281	272,326	0	9,465,782	9,209,641	0	517,565	9,727,206	264,034	0	-2,610	261,424	0	6,335	6,509	173	3	1,415	
RECOUPMENT ACADEMY	Oasis Academy Lister Park	5,550,240	170,992	33,769	6,120,437	5,590,387	0	347,705	5,938,092	-130,846	-33,769	-17,730	-182,345	0	6,803	6,988	185	-41	800	
RECOUPMENT FREE SCH	One In A Million (Free School)	2,575,601	80,439	0	2,840,675	2,752,730	0	184,195	2,936,925	96,690	0	-440	96,250	0	7,140	7,321	181	4	376	
SECONDARY	Parkside School	5,934,816	183,632	0	6,390,868	6,281,589	0	276,995	6,558,584	163,141	0	4,575	167,716	0	5,866	6,017	151	1	1,044	
RECOUPMENT ACADEMY	Trinity Academy Bradford	5,424,284	170,624	8,809	5,910,347	5,812,645	27,220	310,915	6,150,780	217,737	18,411	4,285	240,433	0	6,308	6,451	144	14	901	
RECOUPMENT ACADEMY	Dixons Cottingley Academy	5,262,756	160,186	0	5,729,769	5,751,433	0	324,065	6,075,498	328,491	0	17,238	345,729	0	6,646	6,672	26	46	862	
SECONDARY	St Bede's & St Joseph's Catholic College	8,696,769	264,239	0	9,367,006	9,292,867	0	408,020	9,700,887	331,858	0	2,023	333,881	0	6,150	6,309	158	16	1,473	
RECOUPMENT ACADEMY	The Holy Family Catholic School	4,710,033	140,574	0	5,081,097	4,922,669	0	227,535	5,150,204	72,061	0	-2,955	69,106	0	6,485	6,661	176	-9	739	
RECOUPMENT ACADEMY	Beckfoot Thornton Academy	8,184,775	252,675	0	8,934,021	8,598,472	0	487,490	9,085,962	161,021	0	-9,080	151,941	0	6,446	6,619	174	-10	1,299	
SECONDARY	Titus Salt School	7,409,110	228,239	1,024	7,999,577	7,892,030	1,024	402,545	8,295,598	254,681	0	41,340	296,021	0	6,061	6,219	158	9	1,269	
RECOUPMENT ACADEMY	Tong Leadership Academy	5,805,683	184,119	0	6,438,445	5,797,221	0	424,510	6,221,731	-192,581	0	-24,133	-216,714	0	7,030	7,193	162	-46	806	
RECOUPMENT ACADEMY	Carlton Keighley Academy	4,439,735	128,216	0	4,798,043	4,871,969	0	243,735	5,115,704	304,018	0	13,643	317,661	120,049	6,869	6,891	22	42	707	
RECOUPMENT FREE SCH	Bronte Girls' Academy	3,239,758	98,686	0	3,491,612	4,327,308	0	205,865	4,533,173	988,863	0	52,698	1,041,561	0	6,499	6,520	21	150	664	
RECOUPMENT FREE SCH	Eden Boys Leadership Academy	2,674,572	78,900	0	2,849,509	3,597,892	0	127,065	3,724,957	844,420	0	31,028	875,448	0	6,344	6,518	174	118	552	
SECONDARY TOTALS		195,347,099	5,991,937	509,718	10,694,470	212,543,224	208,679,007	326,468	10,826,795	219,832,270	7,339,972	-183,250	132,325	7,289,046	394,304	6,386	6,524	138	459	31,988

This analysis excludes Early Years, High Needs and Post 16 funding (it shows pre-16 mainstream Schools Block core-NFF based formula funding only).

2022/23 Actuals use the figures included in the APT / Section 251 Budget Statements, except for the Pupil Premium Grant, which uses the latest published figures

2023/24 Formula funding figures are now calculated on October 2022 Census pupils numbers, but still use the October 2021 Census dataset

Pupil Premium Grant (PPG): ESTIMATES for 23/24 are still based on current confirmed 22/23 PPG FSM Ever6 data and using the following rates: £1,385 (p) and £985 (s) per eligible Ever 6 FSM pupil, £320 per eligible service child, and £2,410 per eligible Adopted from Care pupil.

Pupil Premium Grant allocations here are significantly estimated. These also do not include any funding allocated throughout the year for children who are Looked After

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Phase	School	2022/23 Actuals				2023/24 Estimated - see notes below				Variances				MFG	Core Formula Funding				2023/24	
		Formula Funding (excluding rates, PFI and Split Sites)	School Supplementary Grant	Growth Fund (Apr 22-Aug 22) / Safeguarded Salaries	Pupil Premium Grant (latest published)	Total 2022/23 Actual	Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund (Apr 23-Aug 23) / Safeguarded Salaries	ESTIMATED Pupil Premium Grant	Total 2023/24 Estimated	Formula Funding (including MFL & MFG)	Growth Fund / Safeguarded Salaries	Pupil Premium Grant	Total Variances	MFG 2023/24 (included in figures to the left)	2022/23 £app	2023/24 £app	£app Variance	Pupil Number Difference	Funded No.s (October 2022)
RECOUPMENT ACADEMY	Appleton Academy	7,260,685	231,423	21,510	681,895	8,195,513	7,627,686	12,098	660,775	8,300,559	135,578	-9,412	-21,120	105,046	0	6,062	6,242	180	-14	1,222
RECOUPMENT ACADEMY	Bradford Academy	9,353,597	293,289	0	801,745	10,448,631	9,874,296	0	794,060	10,668,356	227,410	0	-7,685	219,725	0	6,200	6,379	179	-8	1,548
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	5,337,116	161,811	35,238	335,435	5,869,600	5,783,851	36,294	339,520	6,159,664	284,924	1,056	4,085	290,065	0	5,515	5,712	196	22	1,019
RECOUPMENT ACADEMY	Dixons Allerton Academy	9,352,395	283,578	0	571,098	10,207,071	9,822,990	0	570,605	10,393,595	187,016	0	-493	186,524	0	5,897	6,015	118	-1	1,633
ALL THROUGH TOTALS		31,303,794	970,101	56,747	2,390,173	34,720,815	33,108,822	48,392	2,364,960	35,522,174	834,927	-8,356	-25,213	801,359	0	5,951	6,115	164	-1	5,422

Notes

This analysis excludes Early Years, High Needs and Post 16 funding (it shows pre-16 mainstream Schools Block core-NFF based formula funding only).

2022/23 Actuals use the figures included in the APT / Section 251 Budget Statements, except for the Pupil Premium Grant, which uses the latest published figures

2023/24 Formula funding figures are now calculated on October 2022 Census pupils numbers, but still use the October 2021 Census dataset

Pupil Premium Grant (PPG): ESTIMATES for 23/24 are still based on current confirmed 22/23 PPG FSM Ever6 data and using the following rates: £1,385 (p) and £985 (s) per eligible Ever 6 FSM pupil, £320 per eligible service child, and £2,410 per eligible Adopted from Care pupil.

Pupil Premium Grant allocations here are significantly estimated. These also do not include any funding allocated throughout the year for children who are Looked After

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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 asks Forum members to consider the feedback received to the consultation on the 2023/24 High Needs Funding models.

Date (s) of any Previous Discussion at the Forum

The consultation document was presented to the Schools Forum meeting 12 October 2022.

Background / Context

The consultation document outlined the formula approach that the Authority proposes to use to delegate Dedicated Schools Grant High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2023/24 financial year. In quick summary, we have proposed to:

- Uplift the rates of top up funding allocated via the existing EHCP Banded Model, as follows:

	(1) % Increase in Top Up Only	(2) % Increase in Top Up plus £6,000	(3) % Increase in Top Up plus £10,000
Band 3L	+ 3.7%	+ 1.0%	+ 0.7%
Band 3M	+ 2.5%	+ 1.0%	+ 0.7%
Band 3H	+ 2.0%	+ 1.0%	+ 0.7%
Band 4L	+ 2.1%	+ 1.3%	+ 1.0%
Band 4M	+ 1.9%	+ 1.3%	+ 1.1%
Band 4H	+ 1.7%	+ 1.3%	+ 1.1%
Protected 7	+ 1.7%	+ 1.4%	+ 1.3%

- Uplift the rates of funding allocated via the PRU / Alternative Provision Day Rate Model. Together, with the fixed £10,000 per place, a proposed 1.73% increase in the day rate will result in an overall 1.04% increase in funding per pupil for each occupied place.
- Continue unchanged the setting-led need factors that are applied in the funding of specialist provisions.
- Continue to allocate the former Teacher Pay Grant and the former Teacher Pension Grant, separately from top up funding, using the method and values we used in 2022/23.
- Continue for an additional year the SEND Funding Floor mechanism that we introduced in 2021/22, in support of Element 2 funding for SEND and EHCPs in mainstream primary and secondary settings. However, we propose to adjust (to increase) the thresholds that are used to calculate this Floor, in seeking to control the cost of this mechanism and to retain the Floor's original purpose, which is to support a minority of schools and academies that have significantly greater numbers of pupils on roll with EHCPs.
- Amend our definition of Notional SEND budgets for mainstream schools and academies, to bring this definition more in line with the national picture and to improve fairness.

The Authority presents separately to this Forum meeting, in Document PH, the annual SEND places sufficiency statement. This report was last presented to the Forum in December 2021. Other information to be presented, as per the schedule of information that was agreed with the Forum on 14 October 2020, on the High Needs Block planned budget and current spending position and balances is presented under agenda items 10 and 11. The Authority expects to present an annual update of the fuller DSG Management Plan, focusing on the High Needs Block, to the 11 January meeting.

Details of the Item for Consideration

Consultation & Responses

The consultation ran between 13 October and 29 November. For the first time this year, responses could be submitted electronically via a web-based survey. It was anticipated that this would help improve the number of responses that are received.

Forum members are encouraged to present their feedback from their discussions with colleagues.

Details of the Item for Consideration

In support of the publication of the consultation document on Bradford Schools Online, School Funding Team attended the autumn term Governor Forum, the District Achievement Partnership (DAP), BSIP, and the Primary & Secondary Business Manager Forums.

The Authority received one formal response, submitted using the web-based survey. Of the questions answered, the respondent 'strongly agreed' with the proposals that were set out in the consultation.

In presenting to various groups, the Authority did not receive any negative comments expressed in real time specifically about the proposals themselves. Some feedback, as in previous consultations, expressed concerns about the general adequacy of SEND funding and the impact on mainstreams schools of the growth in the numbers of pupils with SEND. The District Achievement Partnership expressed their concern that it will continue to be a challenge to manage budgets following a 1% increase in funding, given the on-going rises in costs.

Forum members are asked to consider whether any of the proposals should be amended and / or whether further information is required in order for the Schools Forum to make its recommendations, on 11 January 2023, on the Authority's High Needs Funding Model for 2023/24.

Within the 12 October Schools Forum meeting, members requested some further modelling on the impact of the proposal for the SEND Funding Floor in 2023/24. This modelling is presented in Appendix 1.

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

As set out briefly in Document PF (DSG update). More detailed information will be presented on 11 January.

Appendices

Appendix 1 – Additional Modelling of the SEND Funding Floor (requested by the Schools Forum)

Recommendations

- (1) The Forum is asked to consider the responses received to the consultation and whether any of the proposals on the 2023/24 high needs funding formulae, should be changed in the light of these responses.**
- (2) Members are asked to note that they will be asked to make final recommendations on High Needs Block formula funding on 11 January. As such, Members are asked to consider whether sufficient information has now been provided to enable these recommendations to be made.**

Contact Officer (name, telephone number and email address)

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Column Reference		1	2	3	4	5	6	7	8	9	10
Phase	School	Annual Total SEND Floor Funding 2020/21 (prior to the new Model)	Annual Total SEND Floor Funding 2021/22 (1st Year of New Model)	Annual Total SEND Floor Funding 2022/23 SO FAR AT OCTOBER 2022 (2nd Year of New Model)	No. of EHCps on Roll October 2022 (exc. EY and Post-16)	Annual Equivalent Total SEND Floor Funding 2022/23 using October's EHCps	Annual Equivalent Total SEND Floor Funding 2023/24 using October EHCps, 23/24 indicative funding & +3% Amendment	Annual Equivalent Total SEND Floor Funding 2023/24 using October EHCps, 23/24 indicative funding, without 3% Amendment	Difference Between Columns 6 and 5	Difference Between Columns 6 and 3	Difference Between Columns 6 and 1
All Through	Appleton Academy	0	0	0	20	0	0	0	0	0	0
All Through	Bradford Academy	0	0	7,112	43	12,193	0	22,485	-12,193	-7,112	0
All Through	Bradford Girls Grammar (Free School)	0	922	0	16	0	0	0	0	0	0
All Through	Dixons Allerton Academy	0	0	0	25	0	0	0	0	0	0
Primary	Addingham Primary School	10,453	134	1,476	2	1,476	2,599	4,045	1,123	1,123	-7,854
Primary	All Saints' CE Primary School (Bradford)	0	0	0	6	0	0	0	0	0	0
Primary	All Saints' CE Primary School (Ilkley)	29,377	3,692	6,171	6	8,671	6,536	11,069	-2,136	364	-22,841
Primary	Ashlands Primary School	17,936	25,739	40,424	12	45,424	44,894	49,064	-531	4,469	26,958
Primary	Atlas School	0	601	8,773	7	12,773	8,852	13,952	-3,921	79	8,852
Primary	Baildon CE Primary School	8,097	6,722	14,797	8	13,297	10,391	16,177	-2,906	-4,406	2,294
Primary	Bankfoot Primary School	0	16,176	14,623	6	8,623	4,374	9,239	-4,249	-10,249	4,374
Primary	Barkerend Primary Leadership Academy	0	0	0	6	0	0	0	0	0	0
Primary	Beckfoot Allerton Primary Academy	0	5,225	3,756	4	0	0	0	0	-3,756	0
Primary	Beckfoot Heaton Primary Academy	0	0	0	10	0	0	0	0	0	0
Primary	Beckfoot Priestthorpe Primary School	3,966	5,719	6,239	3	3,966	3,966	4,269	0	-2,273	0
Primary	Ben Rhydding Primary School	15,080	15,080	15,080	4	15,080	15,538	16,840	458	458	458
Primary	Blakehill Primary School	0	23,266	35,258	11	31,758	27,161	33,136	-4,597	-8,097	27,161
Primary	Bowling Park Primary School	0	0	0	10	0	0	0	0	0	0
Primary	Brackenhill Primary School	0	0	0	6	0	0	0	0	0	0
Primary	Burley & Woodhead CE Primary School	8,013	2,026	0	1	0	0	0	0	0	-8,013
Primary	Burley Oaks Primary School	226	5,096	7,719	7	8,219	5,705	11,289	-2,514	-2,014	5,479
Primary	Byron Primary Academy	0	0	0	6	0	0	0	0	0	0
Primary	Carrwood Primary School	0	0	0	5	0	0	0	0	0	0
Primary	Cavendish Primary School	0	13,529	36,646	18	46,646	31,092	42,924	-15,554	-5,554	31,092
Primary	Christ Church Primary Academy	0	4,700	7,422	5	1,922	0	694	-1,922	-7,422	0
Primary	Clayton St John's CE Primary Academy	0	3,387	959	5	0	0	0	0	-959	0
Primary	Clayton Village Primary School	0	0	1,819	4	0	0	638	0	-1,819	0
Primary	Copthorne Primary Academy	0	0	0	8	0	0	0	0	0	0
Primary	Cottingley Village Primary School	1,202	18,731	40,527	13	43,527	40,255	46,062	-3,273	-273	39,052
Primary	Crossflatts Primary School	1,041	20,685	26,490	10	24,490	20,421	26,510	-4,070	-6,070	19,380
Primary	Crossley Hall Primary School	0	41,974	88,903	33	108,403	87,611	104,594	-20,792	-1,292	87,611
Primary	Cullingworth Village Primary Academy	12,868	5,147	352	4	704	0	2,835	-704	-352	-12,868
Primary	Denholme Primary Academy	522	522	6,373	5	12,225	9,976	13,057	-2,249	3,603	9,454
Primary	Dixons Manningham Primary Academy	0	0	0	5	0	0	0	0	0	0
Primary	Dixons Marchbank Academy	0	0	0	9	0	0	0	0	0	0
Primary	Dixons Music Primary	0	32,746	34,700	12	30,700	26,014	33,088	-4,686	-8,686	26,014
Primary	East Morton CE Primary Academy	14,326	14,326	14,326	1	14,326	14,326	14,326	0	0	0
Primary	Eastburn Junior and Infant School	25,030	25,030	25,030	0	25,030	25,030	25,030	0	0	0
Primary	Eastwood Primary Academy	0	6,539	15,783	11	13,283	2,406	12,190	-10,876	-13,376	2,406
Primary	Eldwick Primary School	2,744	0	0	5	0	0	0	0	0	-2,744
Primary	Fagley Primary School	0	14,879	21,672	12	34,172	24,516	31,821	-9,656	2,844	24,516
Primary	Farfield Primary	0	0	0	5	0	0	0	0	0	0
Primary	Farnham Primary Academy	0	0	0	7	0	0	0	0	0	0
Primary	Fearnville Primary Academy	0	0	0	5	0	0	0	0	0	0
Primary	Feversham Primary Academy	0	0	0	7	0	0	0	0	0	0
Primary	Foxhill Primary School	10,111	10,111	10,111	1	10,111	10,111	10,111	0	0	0
Primary	Frizinghall Primary School	0	2,081	0	6	0	0	0	0	0	0
Primary	Girlington Primary School	0	26,964	68,782	24	83,282	68,318	79,961	-14,964	-464	68,318
Primary	Glenaire Primary School	0	147	0	3	0	0	0	0	0	0
Primary	Green Lane Primary School	0	5,823	27,541	21	39,041	22,807	38,683	-16,234	-4,734	22,807
Primary	Greengates Primary School	0	0	0	2	0	0	0	0	0	0
Primary	Grove House Primary School	0	9,064	17,984	12	28,984	19,310	27,417	-9,674	1,326	19,310
Primary	Harden Primary Academy	12,366	11,668	9,418	3	6,918	7,100	8,777	182	-2,318	-5,266
Primary	Haworth Primary Academy	609	13,898	16,531	6	15,531	14,663	17,946	-867	-1,867	14,055
Primary	Heaton St Barnabas' CE Primary School	0	0	0	6	0	0	0	0	0	0
Primary	High Craggs Primary Leadership Academy	0	4,406	19,194	10	13,194	1,393	10,410	-11,801	-17,801	1,393
Primary	Hill Top CE Primary School	12,263	15,086	20,552	6	18,052	13,346	16,831	-4,706	-7,206	1,083
Primary	Hollingwood Primary Academy	0	15,392	18,234	11	15,234	3,076	12,757	-12,158	-15,158	3,076
Primary	Holybrook Primary Academy	0	15,291	10,215	9	12,715	5,627	13,069	-7,089	-4,589	5,627
Primary	Holycroft Primary Academy	0	9,512	0	7	0	0	0	0	0	0
Primary	Home Farm Primary School	0	5,046	19,184	11	16,184	4,098	13,621	-12,086	-15,086	4,098
Primary	Horton Grange Primary Academy	0	0	0	9	0	0	0	0	0	0
Primary	Horton Park Primary Academy	0	0	0	5	0	0	0	0	0	0
Primary	Hoyle Court Primary School	0	23,247	37,663	9	32,663	30,005	33,697	-2,658	-7,658	30,005
Primary	Idle CE Primary School	0	0	3,375	7	6,375	2,747	8,614	-3,629	-629	2,747
Primary	Ingrow Primary School	0	0	1,110	8	0	0	0	0	-1,110	0
Primary	Iqra Primary Academy	0	0	0	8	0	0	0	0	0	0
Primary	Keelham Primary School	26,470	26,470	26,470	1	26,470	26,470	26,470	0	0	0
Primary	Keighley St Andrew's CE Primary School	0	4,802	5,566	9	2,066	0	2,141	-2,066	-5,566	0
Primary	Killinghall Primary School	0	6,641	7,574	14	1,074	0	0	-1,074	-7,574	0
Primary	Knowleswood Primary School	0	0	0	10	0	0	0	0	0	0
Primary	Lapage Primary School and Nursery	0	11,334	20,947	17	15,947	788	16,359	-15,159	-20,159	788
Primary	Laycock Primary Academy	0	0	214	3	285	0	1,891	-285	-214	0
Primary	Lees Primary Academy	8,866	8,866	8,866	3	8,866	8,866	8,866	0	0	0
Primary	Ley Top Primary School	0	0	0	4	0	0	0	0	0	0
Primary	Lidget Green Primary School	0	0	0	13	0	0	0	0	0	0
Primary	Lilycroft Primary School	0	8,529	1,483	8	0	0	0	0	-1,483	0

Column Reference		1	2	3	4	5	6	7	8	9	10
Phase	School	Annual Total SEND Floor Funding 2020/21 (prior to the new Model)	Annual Total SEND Floor Funding 2021/22 (1st Year of New Model)	Annual Total SEND Floor Funding 2022/23 SO FAR AT OCTOBER 2022 (2nd Year of New Model)	No. of EHCs on Roll October 2022 (exc. EY and Post-16)	Annual Equivalent Total SEND Floor Funding 2022/23 using October's EHCs	Annual Equivalent Total SEND Floor Funding 2023/24 using October EHCs, 23/24 indicative funding & +3% Amendment	Annual Equivalent Total SEND Floor Funding 2023/24 using October EHCs, 23/24 indicative funding, without 3% Amendment	Difference Between Columns 6 and 5	Difference Between Columns 6 and 3	Difference Between Columns 6 and 1
Primary	Carlton Mills Primary School	0	12,977	16,260	9	11,760	7,033	14,258	-4,728	-9,228	7,033
Primary	Long Lee Primary School	0	24,345	31,461	11	27,461	21,655	28,471	-5,805	-9,805	21,655
Primary	Low Ash Primary School	0	560	13,365	10	22,762	18,450	24,843	-4,312	5,085	18,450
Primary	Low Moor CE Primary School	909	0	684	4	0	0	0	0	-684	-909
Primary	Lower Fields Primary School	0	0	0	8	0	0	0	0	0	0
Primary	Margaret McMillan Primary School	0	0	3,554	14	6,949	0	6,887	-6,949	-3,554	0
Primary	Marshfield Primary School	0	0	0	7	0	0	0	0	0	0
Primary	Menston Primary School	14,288	0	0	2	0	0	0	0	0	-14,288
Primary	Merlin Top Primary Academy	0	0	0	6	0	0	0	0	0	0
Primary	Miriam Lord Community Primary School	0	304	7,032	10	12,533	0	5,801	-12,533	-7,032	0
Primary	Myrtle Park Primary School	32,571	32,571	32,571	1	32,571	32,571	32,571	0	0	0
Primary	Beckfoot Nessfield Primary Academy	785	785	785	2	785	785	785	0	0	0
Primary	Newby Primary School	0	0	0	7	0	0	0	0	0	0
Primary	Newhall Park Primary School	0	7,473	2,290	9	4,580	0	3,204	-4,580	-2,290	0
Primary	Oakworth Primary Academy	0	0	0	1	0	0	0	0	0	0
Primary	Oldfield Primary School	31,679	31,679	31,679	3	31,679	31,679	31,679	0	0	0
Primary	Our Lady & St Brendan's Catholic Primary School	0	10,551	23,246	9	26,246	19,589	24,883	-6,657	-3,657	19,589
Primary	Our Lady of Victories Catholic Primary Academy	0	5,952	14,094	7	15,094	9,207	14,252	-5,887	-4,887	9,207
Primary	Oxenhope CE Primary Academy	8,471	8,471	8,471	1	8,471	8,471	8,471	0	0	0
Primary	The Co-op Academy Parkland	0	0	0	4	0	0	0	0	0	0
Primary	Parkwood Primary School	0	1,192	0	5	0	0	0	0	0	0
Primary	Peel Park Primary School	0	34,929	51,041	22	49,541	39,040	53,341	-10,501	-12,001	39,040
Primary	Poplars Farm Primary School	0	14,874	19,049	10	22,049	9,611	17,363	-12,438	-9,438	9,611
Primary	The Co-op Academy Princeville	0	0	1,790	8	0	0	0	0	-1,790	0
Primary	Rainbow Primary Leadership Academy	0	0	0	5	0	0	0	0	0	0
Primary	Reevy Hill Primary School	0	0	0	3	0	0	0	0	0	0
Primary	Riddlesden St Mary's CE Primary	0	13,250	22,881	11	27,881	18,444	25,760	-9,437	-4,437	18,444
Primary	Russell Hall Primary School	14,389	27,542	24,004	7	25,504	22,801	25,754	-2,703	-1,203	8,412
Primary	Ryecroft Primary Academy	0	0	0	2	0	0	0	0	0	0
Primary	Saltaire Primary School	0	31,998	43,373	14	49,873	45,734	51,621	-4,139	2,361	45,734
Primary	Sandal Primary School and Nursery	4,924	0	0	3	0	0	0	0	0	-4,924
Primary	Sandy Lane Primary School	0	0	0	3	0	0	0	0	0	0
Primary	Shibden Head Primary Academy	0	5,745	23,525	10	27,025	23,442	29,066	-3,583	-83	23,442
Primary	Shipleigh CE Primary Academy	0	773	0	1	0	0	0	0	0	0
Primary	Shirley Manor Primary Academy	0	0	0	2	0	0	0	0	0	0
Primary	Silsden Primary School	17,421	430	0	6	0	0	0	0	0	-17,421
Primary	Southmere Primary Academy	0	0	0	7	0	0	0	0	0	0
Primary	St Anne's Catholic Primary Academy	0	8,647	899	3	0	0	0	0	-899	0
Primary	St Anthony's Catholic Primary School (Clayton)	0	0	0	1	0	0	0	0	0	0
Primary	St Anthony's Catholic Primary School (Shipleigh)	11,040	11,040	11,040	2	11,040	11,040	11,040	0	0	0
Primary	St Clare's Catholic Primary School	0	9,197	7,110	6	4,610	0	2,834	-4,610	-7,110	0
Primary	St Columba's Catholic Primary School	0	0	2,606	9	5,212	0	1,862	-5,212	-2,606	0
Primary	St Cuthbert & the First Martyrs' Catholic Primary	13,505	13,505	13,505	4	13,505	13,505	13,505	0	0	0
Primary	St Francis' Catholic Primary School	0	9,993	14,298	5	14,298	11,530	14,372	-2,768	-2,768	11,530
Primary	St James Primary Academy	0	11,868	19,829	10	17,329	7,427	15,342	-9,903	-12,403	7,427
Primary	St John The Evangelist Catholic Primary	0	3,390	7,565	4	7,565	3,351	6,528	-4,214	-4,214	3,351
Primary	St John's CE Primary School	0	0	0	7	0	0	0	0	0	0
Primary	St Joseph's Catholic Primary School (Bingley)	9,636	17,200	22,201	5	19,701	18,769	20,497	-931	-3,431	9,133
Primary	St Joseph's Catholic Primary School (Bradford)	0	0	0	4	0	0	0	0	0	0
Primary	St Joseph's Catholic Primary, Keighley	0	27,021	36,240	12	40,740	34,686	40,427	-6,054	-1,554	34,686
Primary	St Luke's CE Primary School	0	10,731	6,952	5	7,452	912	5,387	-6,540	-6,040	912
Primary	St Mary's and St Peter's Catholic	0	0	0	3	0	0	0	0	0	0
Primary	St Matthew's Catholic Primary School	0	2,701	464	4	0	0	0	0	-464	0
Primary	St Matthew's CE Primary School	0	329	16,003	11	15,003	6,984	16,063	-8,020	-9,020	6,984
Primary	St Oswald's CE Primary Academy	0	0	758	9	0	0	0	0	-758	0
Primary	St Paul's CE Primary School	0	0	0	2	0	0	0	0	0	0
Primary	St Philip's CE Primary Academy	0	0	0	4	0	0	0	0	0	0
Primary	St Stephen's CE Primary School	0	0	0	5	0	0	0	0	0	0
Primary	St Walburga's Catholic Primary School	9,291	22,141	33,481	8	35,981	34,701	36,747	-1,279	1,221	25,410
Primary	St William's Catholic Primary School	1,553	1,553	1,553	2	1,553	1,553	1,553	0	0	0
Primary	St Winefride's Catholic Primary	0	0	7,362	8	12,434	3,921	10,702	-8,513	-3,441	3,921
Primary	Stanbury Village School	19,085	19,085	19,085	2	19,085	19,085	19,085	0	0	0
Primary	Steeeton Primary School	0	500	1,759	3	0	0	0	0	-1,759	0
Primary	Stocks Lane Primary School	22,456	22,456	22,456	4	22,456	22,456	22,456	0	0	0
Primary	Swain House Primary School	0	19,529	17,323	12	19,323	6,606	16,667	-12,717	-10,717	6,606
Primary	Thackley Primary School	0	0	0	4	0	0	0	0	0	0
Primary	The Sacred Heart Catholic Primary Academy	19,256	19,256	19,256	3	19,256	19,256	19,256	0	0	0
Primary	Thornbury Primary Leadership Academy	0	0	0	8	0	0	0	0	0	0
Primary	Thornton Primary School	0	0	0	5	0	0	0	0	0	0
Primary	Thorpe Primary School	0	0	0	2	0	0	0	0	0	0
Primary	Trinity All Saints CE Primary School	1,431	4,360	2,586	0	0	0	0	0	-2,586	-1,431
Primary	Victoria Primary School	0	0	0	3	0	0	0	0	0	0
Primary	Wellington Primary School	0	0	864	7	1,727	0	0	-1,727	-864	0
Primary	Westbourne Primary School	0	2,923	0	4	0	0	0	0	0	0
Primary	Westminster CE Primary Academy	0	0	0	11	0	0	0	0	0	0
Primary	Whetley Primary Academy	0	0	0	3	0	0	0	0	0	0
Primary	Wibsey Primary School	0	2,321	0	6	0	0	0	0	0	0
Primary	Wilsden Primary School	7,656	4,736	3,418	3	0	0	0	0	-3,418	-7,656
Primary	Woodlands Primary Academy	6,480	6,480	6,480	1	6,480	6,480	6,480	0	0	0
Primary	Woodside Academy	0	0	0	8	0	0	0	0	0	0

	Column Reference	1	2	3	4	5	6	7	8	9	10
Phase	School	Annual Total SEND Floor Funding 2020/21 (prior to the new Model)	Annual Total SEND Floor Funding 2021/22 (1st Year of New Model)	Annual Total SEND Floor Funding 2022/23 SO FAR AT OCTOBER 2022 (2nd Year of New Model)	No. of EHCPS on Roll October 2022 (exc. EY and Post-16)	Annual Equivalent Total SEND Floor Funding 2022/23 using October's EHCPS	Annual Equivalent Total SEND Floor Funding 2023/24 using October EHCPS, 23/24 indicative funding & +3% Amendment	Annual Equivalent Total SEND Floor Funding 2023/24 using October EHCPS, 23/24 indicative funding, without 3% Amendment	Difference Between Columns 6 and 5	Difference Between Columns 6 and 3	Difference Between Columns 6 and 1
Primary	Worth Valley Primary Academy	0	3,768	19,293	8	16,293	7,615	13,828	-8,678	-11,678	7,615
Primary	Worthinghead Primary School	1,204	3,339	6,216	5	7,716	4,538	8,455	-3,178	-1,678	3,334
Primary	Wycliffe CE Primary Academy	0	2,951	0	1	0	0	0	0	0	0
Secondary	Beckfoot Academy	0	84,217	141,429	43	167,429	159,829	177,678	-7,600	18,400	159,829
Secondary	Beckfoot Oakbank Academy	0	0	0	28	0	0	0	0	0	0
Secondary	Beckfoot Thornton Academy	0	0	1,533	31	3,065	0	8,961	-3,065	-1,533	0
Secondary	Beckfoot Upper Heaton Academy	0	2,123	685	22	0	0	8,013	0	-685	0
Secondary	Belle Vue Girls' Academy	0	0	0	9	0	0	0	0	0	0
Secondary	Bingley Grammar School	0	4,017	13,520	24	27,040	4,006	29,460	-23,034	-9,514	4,006
Secondary	Bradford Forster Academy	0	0	0	25	0	0	0	0	0	0
Secondary	Bronte Girls' Academy	0	0	0	0	0	0	0	0	0	0
Secondary	Buttershaw Business & Enterprise College Academy	0	10,137	40,317	48	62,317	18,689	67,655	-43,628	-21,628	18,689
Secondary	Carlton Bolling College	0	0	0	35	0	0	0	0	0	0
Secondary	Carlton Keighley Academy	0	36,217	25,901	23	26,401	11,716	34,677	-14,685	-14,185	11,716
Secondary	Co-op Academy Grange	0	0	0	26	0	0	0	0	0	0
Secondary	Dixons City Academy	0	18,138	24,158	21	26,658	8,529	29,887	-18,129	-15,629	8,529
Secondary	Dixons Cottingley Academy	0	0	0	5	0	0	0	0	0	0
Secondary	Dixons Kings Academy	0	12,873	23,118	21	27,118	10,945	31,864	-16,173	-12,173	10,945
Secondary	Dixons McMillan Academy	0	6,131	3,754	13	3,754	0	3,921	-3,754	-3,754	0
Secondary	Dixons Trinity Academy	0	80,472	77,065	24	73,565	58,966	74,427	-14,598	-18,098	58,966
Secondary	Eden Boys Leadership Academy	0	0	0	0	0	0	0	0	0	0
Secondary	Feversham College	0	0	0	4	0	0	0	0	0	0
Secondary	Hanson School	0	0	0	27	0	0	0	0	0	0
Secondary	Ilkley Grammar School	8,051	83,469	61,617	30	74,117	75,382	94,404	1,266	13,766	67,332
Secondary	Immanuel College Academy	0	0	0	21	0	0	0	0	0	0
Secondary	Laisterdyke Leadership Academy	0	0	0	10	0	0	0	0	0	0
Secondary	Oasis Academy Lister Park	0	0	0	21	0	0	0	0	0	0
Secondary	One In A Million (Free School)	623	22,525	4,182	7	0	0	0	0	-4,182	-623
Secondary	Parkside School	0	61,512	100,105	33	113,105	98,101	116,186	-15,004	-2,004	98,101
Secondary	St Bede's & St Joseph's Catholic College	0	0	0	14	0	0	0	0	0	0
Secondary	The Holy Family Catholic School	0	13,048	6,590	19	11,298	0	16,983	-11,298	-6,590	0
Secondary	Titus Salt School	0	138,250	208,250	62	243,250	219,117	246,914	-24,133	10,867	219,117
Secondary	Tong Leadership Academy	0	0	0	12	0	0	0	0	0	0
Secondary	Trinity Academy Bradford	0	3,286	31,293	23	30,793	9,751	33,069	-21,041	-21,541	9,751
Totals		478,269	1,650,810	2,288,713	1,835	2,481,329	1,868,342	2,569,154	-612,987	-420,371	1,390,073

No. of schools / academies in receipt of funding	44	109	111
% of schools / academies in receipt of funding	23%	57%	58%
Mean Average Allocation	10,870	15,145	20,619

	96	81	96
	50%	42%	50%
	25,847	23,066	26,762

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SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

To provide a summary-level forecast of the DSG income / expenditure position that is currently estimated for the 2023/24 financial year.

Date (s) of any Previous Discussion at the Forum

The DSG's position for 2023/24 has begun to be considered within the consultation items presented in the autumn term. However, this is the first indicative DSG summary to be presented.

Background / Context

Our DSG allocation for 2023/24 will continue to be split into four blocks (in size order):

- Schools Block – funding mainstream Primary & Secondary school and academy core formula allocations, School Block de-delegated items (maintained schools) and Growth & Falling Rolls Funds. c. £510m
- High Needs Block – funding provision for high needs children with additional needs valued at greater than £6,000 per annum, including Special schools, PRUs / AP and Post 16 students in Further Education Colleges, as well as SEND support services and other alternative provision and placements. c. £112m
- Early Years Block – funding the Early Years Single Funding Formula and centrally managed items relating to early years entitlement provision (the 2, 3 and 4 year old entitlements). c. £43m
- Central Schools Services Block – established at April 2018 to fund items previously 'collected' via 'top-slice' within the Schools Block, including pupil admissions, copyright licensing and other local authority statutory duties held in respect of state funded schools and academies. c. £3.6m

Each of the four blocks is now calculated on a National Funding Formula (NFF) basis, which includes protection (for losers) and damping (for winners) as the DSG system moves towards the fuller implementation of NFF over time. 2023/24 is the sixth year of implementation of the NFF distribution.

Many aspects of the DSG for 2023/24 have now been confirmed and will not change. However, there are still some significant elements that will be confirmed by Government later in December and some that will only be confirmed during and after 2023/24, including Early Years Block funding and adjustments to the High Needs Block for imports and exports between authorities and for academy conversions.

With the Schools Forum's agreement, the Authority has previously established the principle of the 'ring-fencing' of all the four blocks, meaning that spending pressures and NFF-led funding level changes relating to each block are managed within that block. As set out in Document PG, the Authority continues to apply the principle of block ring-fencing, informally, to the management of brought forward balances. However, although the DSG is split into separate blocks, Forum members should continue to recognise the inter-connectivity that exists, especially between the High Needs Block and the Schools and Early Years Blocks.

The Schools Block is formally ring-fenced in Regulations. Authorities continue to be permitted to transfer a maximum of 0.5% of the Schools Block budget to other blocks, including to the High Needs Block, with the approval of the Schools Forum. Larger transfers must be approved by the Secretary of State.

The Regulations (subject to confirmation for 2023/24) require a pass through of 95% of the Early Years Block (EYB) 3 & 4-year-old funding to the rates applied for 3 & 4-year-old entitlement providers. This has the effect of limiting the size of centrally managed funds that can be held within the EYB, as well as restricting the value of the EYB that can be transferred to other blocks or that can be used in support of the 2-year-old entitlement.

There are no formal 'ring-fencing' restrictions set in the Regulations for the Central Schools Services Block or for the High Needs Block.

Additional reports to this meeting provide more details of the management of spending within each of the blocks. A more detailed and more confirmed analysis of the 2023/24 DSG income position, and planned expenditure, will be provided for the Schools Forum on 11 January.

Details of the Item for Consideration

Appendix 1 provides a high level position statement for the 2023/24 DSG, based on current estimates and assuming that the proposals that have been put forward for formula funding arrangements and for centrally managed funds are fully implemented. This statement also makes assumptions about anticipated Early Years Block arrangements, which are discussed further in Document PB in advance DfE announcements.

There are a number of aspects of DSG income and expenditure that are still to be confirmed. The Schools Forum still has to make its final recommendations on formula funding arrangements, in the light of feedback from the consultations. In addition to early years funding, one of the more significant aspects to confirm is the cost of Schools Block formula funding calculated on the October 2022 Census dataset, which will be available mid-December. As such, Forum members are asked to view this summary only as an estimate intended to help plan for decisions. A more confirmed and more detailed summary, as well as a DSG Management Plan, on which the Forum will be asked to make its recommendations on the 2023/24 planned budget, will be presented on 11 January. These aspects of the estimated position, shown in Appendix 1, are highlighted:

- **We estimate we will receive £33.74m (+5.3%) more income than we received in 2022/23 (ROW C)**
 - £25.48m (5.3%) within the Schools Block. Of this increase, £13.90m relates to the transfer of the Schools Supplementary Grant into the Schools Block, leaving £11.58m, which is actually new funding. The majority of this growth comes from the increase provided by the NFF-led settlement, rather than by a substantial net growth in our number of pupils (as has been the case in prior years). Our Schools Block income forecast is based on estimated total October 2022 Census pupil numbers recorded at 88,913, compared against a total of 88,871 recorded at October 2021; a net change of +42. Within this estimated total, primary-phase numbers are estimated to have reduced by 470 and secondary-phase numbers are estimated to have increased by 512 between October 2022 and October 2021.
 - £6.72m (6.4%) within the High Needs Block. This is new funding (rather than the impact of any transfers). The majority of this growth comes from the increase provided by the NFF-led settlement, through which Bradford is receiving + 6.8% per pupil. Our High Needs Block allocation in 2023/24 has not been affected by the DfE's High Needs Block growth ceiling, which was set at 7.00% per pupil.
 - £1.52m (3.6%) estimated within the Early Years Block. Of this increase, £1.02m relates to the transfer of the former Teacher Pay and Pensions Grants, allocated to schools and academies, into the Early Years Block, which we assume will take place. This leaves £0.50m, which is actually new funding. This growth in funding, as a cash value of £1.52m, is estimated using the entitlement numbers that are used by the DfE in 2022/23. Actual cash growth will be affected by changes in our entitlement delivery that will be recorded during 2023/24. We estimate that the values of funding per hour for entitlement delivery that Bradford will receive from the DfE in 2023/24 will increase by 1.0% for 2 year olds and by 1.0% for 3&4 year olds, as set out by the DfE in its summer consultation. Our estimate of the Early Years Block includes the continuation of the Maintained Nursery School Supplement at £1.17m. This has been adjusted for the Teacher Pay and Pensions Grants and for the re-distribution of Supplement funding, as proposed by the DfE.
 - We estimate that there won't be a significant change in the cash value of our Central Schools Services Block (CSSB) allocation in 2023/24. Whilst we will receive from the DfE growth in funding per pupil of 2.23% through the NFF-led settlement, which is new funding (rather than the impact of transfers), this growth will be offset by the DfE's continued reduction in funding relating to historic commitments, with our allocation being further reduced by £0.05m to £0.18m.
- **Whilst recognising that further discussion may be needed with the Schools Forum to achieve this, we anticipate presenting on 11 January planned DSG budgets for the Schools, Central Schools Services and Early Years Blocks, that do broadly balance 'in year' but which then use a proportion of surplus balances that are forecasted to be carried forward to specific formula funding-based activities. On current estimates however, we anticipate presenting a High Needs Block budget for 2023/24, which substantially exceeds the High Needs Block funding allocation, and which will require a significant proportion of surplus balance to absorb. (ROWS I and J).**

The most substantial uses of carry forward balances that are currently anticipated, are:

- Continuing to support the costs of the Early Years Single Funding Formula within the Early Years Block, whilst maximising rates of funding for providers delivering the entitlements.
- Supporting achieving a balanced Schools Block planned budget, where the funding formulae we have proposed is not affordable when the October 2022 dataset is used. Appendix 1 does not yet show this. The allocation of surplus balances may take place in combination with formulae adjustment. This will be further discussed with the Schools Forum on 11 January, once the impact of the October 2022 dataset is known and has been modelled.

Details of the Item for Consideration

- Supporting the overall financial position of the High Needs Block in 2023/24, where we currently estimate an overspend of £7.63m. Of the £7.63m, £4.00m relates to new revenue budget for additional locally developed specialist places and £0.92m assumes the continuation of the Authority's inclusion investment plan spending, presented to the Forum in July 2022, which will be subject to an impact assessment in summer 2023. Without these two budgets, the overspend in 2023/24 would be lower, at an estimated £2.71m. However, the £4.00m for new places is a 'permanent' addition to spending within our High Needs Block, which must be absorbed. The DSG Management Plan, which will be presented to the Forum on 11 January, will discuss in more detail the on-going position of the High Needs Block.
- The retention of the ring-fenced Growth Fund balance held within the Schools Block to help meet the cost of Growth Fund allocations in 2023/24, rather than taking a higher value of new budget from the 2023/24 Schools Block allocation.
- The retention of the ring-fenced Falling Rolls Fund balance held within the Schools Block to meet the cost of Falling Rolls Fund allocations, rather than taking new budget from the 2023/24 Schools Block allocation.
- Continuing to use a proportion of the ring-fenced De-Delegated Funds balance held within the Schools Block to help reduce the values of contributions that would otherwise be taken from maintained school budgets in 2023/24.
- Continuing to use the ring-fenced Disability Access Funds (DAF) balance held within the Early Years Block to continue to uplift the value of DAF funding per child that is allocated to providers.
- **We anticipate that there won't be any transfers of DSG income between blocks in 2023/24 (ROW H).** We do plan to return to the Early Years Block the remaining proportion of expenditure on early years SEND provision that we moved to the High Needs Block as part of the mitigating action that we took on an exceptional basis to support the Early Years Block during the COVID-19 pandemic period. This represents a transfer of expenditure from the High Needs Block to the Early Years Block in 2023/24 however, rather than a transfer of income.
- **We forecast that our DSG account will not be in deficit, either at 31 March 2022 or 31 March 2023 (ROWS M AND N).**
- **We forecast that there will be a net surplus of balances held at 31 March 2023 in centrally managed funds within the Central Schools Services Block, as well as in De-Delegated Funds within the Schools Block, meaning that we do not anticipate that the 2023/24 Schools Budget will be needed to write off any net deficit balances in funds that are carried forward from 2022/23 (ROW F).**
- **We do not plan to hold 'safety net' provision (completely unallocated contingency) within the 2023/24 planned budget (ROW E).** We do plan to continue to prudently approach our estimates of growth in spending within the High Needs Block. We have however, removed from the 2023/24 planned budget the previously earmarked £1.0m that was held for the EHCP Banded Model and that was expected to be used as the 'stacking' functionality of this Model developed.

In 2023/24, any unexpected or higher than expected costs, where these cannot be met by savings elsewhere within that block, will be need to covered by brought forward balances or be carried forward to be dealt with in 2024/25. The total value of balances that are estimated to be carried forward at both March 2023 and March 2024 should ensure that our DSG account remains in surplus in 2023/24 and in 2024/25.

The positions of both the Early Years Block and the High Needs Block however, in particular, require close monitoring. The DSG Management Plan, which will be presented to the Forum on 11 January, will discuss in more detail the position of the High Needs Block. Regarding the Early Years Block, we are hopeful that our earmarking of £0.95m of Early Years Block balances to the cost of our 2023/24 EYSFF proposals, will represent that maximum value of balances that will be needed next year. This however, is subject to the DfE's announcements to come, and our analysis of their impact.

- **We do not plan any addition to the 2023/24 Schools Budget from non-DSG funds (ROW K).**

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

As outlined in this paper.

Recommendations

Forum members are asked to consider the information presented in the report, for reference, in advance of making final recommendations on 11 January 2023.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – 2023/24 Indicative DSG Summary.

Contact Officer (name, telephone number and email address)

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2023/24 Planned Budget (Dedicated Schools Grant (DSG) Income and Expenditure Summary)

	Schools Block	High Needs Block	Early Years Block	Central Schools Services Block	Total DSG
A) ESTIMATED 2023/24 DSG ALLOCATION (before academy recoupment and other ESFA direct funding reductions)	509,853,151	111,903,858	43,255,744	3,561,285	668,574,037
% of total DSG by Block	76.3%	16.7%	6.5%	0.5%	
B) 2022/23 DSG ALLOCATION (latest) (please note that final 2022/23 Early Years Block allocation will not be confirmed until July 2023)	484,375,281	105,188,927	41,738,218	3,531,144	634,833,570
C) DIFFERENCE IN DSG ALLOCATION A - B (positive = income increase)	25,477,870	6,714,931	1,517,526	30,141	33,740,467
D) TOTAL ESTIMATED PLANNED EXPENDITURE 2023/24 SCHOOLS BUDGET	509,953,987	119,532,768	44,201,059	3,584,525	677,272,339
E) VALUE OF SPENDING SAFETY NET PROVISION WITHIN PLANNED EXPENDITURE ROW D	0	0	0	0	0
F) VALUE OF 2023/24 SCHOOLS BUDGET (ROW D) PROPOSED TO WRITE OFF DEFICIT BALANCE BROUGHT FORWARD FROM 2022/23	0	0	0	0	0
G) TOTAL UNDERSPEND / OVERSPEND ON 2023/24 DSG ALLOCATION A - D (negative = overspend)	-100,836	-7,628,910	-945,315	-23,241	-8,698,302
H) PROPOSED TRANSFER OF DSG INCOME BETWEEN BLOCKS 2023/24	0	0	0	0	0
I) PROPOSED ALLOCATION OF BALANCE BROUGHT FORWARD FROM 2022/23 TO SUPPORT SPECIFIC AGREED ITEMS INCLUDED IN ROW D	0	920,000	945,315	0	1,865,315
J) BALANCE BROUGHT FORWARD FROM 22/23 TO SUPPORT BLOCK OVERSPEND IN 23/24 (POSITIVE) OR UNDER SPEND IN 23/24 TO RETAIN (NEGATIVE)	100,836	6,708,910	0	23,241	6,832,987
K) ADDITIONAL NON-DSG FUNDS ALLOCATED TO SUPPORT DSG SPENDING ACTIVITY	0	0	0	0	0
L) ESTIMATED FINAL OVER OR UNDER SPEND POSITION BY BLOCK IN 2023/24 G + H + I + J + K (negative = overspend)	0	0	0	0	0
M) ESTIMATED BLOCK BALANCE BROUGHT FORWARD FROM 2022/23 (positive = surplus)	5,319,339	25,688,312	4,216,100	281,158	35,504,909
N) ESTIMATED BLOCK BALANCE TO BE CARRIED FORWARD INTO 2024/25 AFTER ROWS I + J (positive = surplus)	5,218,503	18,059,402	3,270,785	257,917	26,806,607
O) ESTIMATED SCHOOLS BLOCK DE-DELEGATED / EARLY YEARS FUNDS BALANCE BROUGHT FORWARD FROM 22/23 WITHIN ROW M (positive = surplus)	797,083		71,709		868,792
P) ESTIMATED SCHOOLS BLOCK GROWTH FUND BALANCE BROUGHT FORWARD FROM 22/23 WITHIN ROW M (positive = surplus)	1,296,284				1,296,284
Q) ESTIMATED SCHOOLS BLOCK FALLING ROLLS FUND BALANCE BROUGHT FORWARD FROM 22/23 WITHIN ROW M (positive = surplus)	500,000				500,000
R) ESTIMATED EARLY YEARS BLOCK DAF (DISABILITY ACCESS FUND) BALANCE BROUGHT FORWARD FROM 22/23 WITHIN ROW M (positive = surplus)			740,715		740,715

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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 updates Forum members on the forecasted spending positions of each of the DSG Blocks in 2022/23. This document gives members a view of the estimated values of balances to be carried forward into 2023/24 and a view of the uses of these balances.

Date (s) of any Previous Discussion at the Forum

The allocation / retention of balances estimated to be carried forward into 2022/23 was agreed by the Schools Forum as part of its recommendations on the allocation of the DSG that were made on 12 January 2022. Final confirmation of balances brought forward from 2021/22 was presented on 14 September 2022.

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 balances to be carried forward at the end of each financial year, which are initially presented to the Forum in December, 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 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. The Forum has already committed a value of the balances that are presented in this report.

In closing the 2017/18 financial year, we began to separate balances according 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 across financial year-end that are associated with de-delegated funds in the Schools and Early Years Blocks 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 in the values of the contributions taken for access to de-delegated funds in the next financial year. The DSG Regulations require Forum approval for the writing off of any deficits related to de-delegated funds from the Schools Budget. To date we have not ever asked the Forum to do this.

The Growth Fund and Falling Rolls Fund are treated as ring-fenced funds within the Schools Block. It is our current practice 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 expected by the DfE to be earmarked and identified separately.

The DfE changed, within the February 2020 Finance Regulations, 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

- Up to the end of the 2022/23 financial year, 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.
- Up to the end of the 2022/23 financial year, 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.

So the statutory basis, up to the end of the 2022/23 financial year, is that a DSG 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 authorisation. Bradford's DSG account is not in deficit at the end of 2022/23 and there are no additional contributions from non-DSG income sources into the Schools Budget in 2022/23 or proposed for 2023/24. Through the DSG's 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 challenge 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. The DfE also now 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 expect to present an update of DSG Management Plan to the Forum on 11 January.

Details of the Item for Consideration

2022/23 Forecasted DSG Spending Position vs. Planned Budget

Appendix 1 provides a detailed spending forecast as well as an updated view of the values of balances that are estimated to be held at the end of the 2022/23 financial year. These figures exclude balances held by maintained schools. The table below summarises the estimated positions by block and gives a comparison against the values of balances that were estimated would be held at the end of 2022/23 within the planned budget that was presented to the Schools Forum on 12 January 2022. (£m)

	Schools Block	High Needs Block	Early Years Block	Central Schools Services Block	Total
Estimate of Balances carried from 21/22*	+£6.375	+£21.739	+£4.001	£0.000	+£32.115
Net Value of Balances allocated in 22/23 *	-£0.747	+£0.319	-£0.735	£0.000	-£1.163
Estimate of Balances to be held at 31/3/23 *	+£5.628	+£22.058	+£3.266	£0.000	+£30.952
Additional Balances carried from 21/22 **	+£0.309	+£1.282	+£0.175	£0.231	+£1.997
Net Spend Variance on Planned Budget 22/23	-£0.618	+£2.349	+£0.775	+£0.050	+£2.556
Revised Estimate of Balances at 31/3/23 ***	+£5.319	+£25.689	+£4.216	+£0.281	+£35.505
Diff Between Original and Current Estimate	-£0.309	+£3.631	+£0.950	+£0.281	+£4.553

* 2022/23 Planned Budget presented to the Schools Forum on 12 January 2022. Document NY.

** Confirmation of final balances held 31 March 2022 was presented to the Schools Forum on 14 Sept 2022.

*** £35.505m is 5.5% of the 2022/23 DSG allocation (£2.256m is 0.35% of the 2022/23 planned budget)

Please note that the £35.505m figure is estimated. In particular, we highlight that the balance to be held in the Early Years Block is calculated on estimates of spring term 2023 EYSFF allocations, and the High Needs Block balance is based on a series of assumptions about the cost of high needs provision between December and March. An updated estimate will be presented on 11 January. The reconciliation of funds, which takes place as part of the Authority's year-end closedown and which will be presented to the Forum in July 2023, will confirm the final values of balances that have been carried forward at 31 March 2023.

We forecast that the 2022/23 planned budget for the **Schools Block** will be over-spent by £0.618m (0.13%):

- - £236,720 estimated net over-spend within de-delegated funds, from the deliberate use of balance brought forward to support the cost of the primary phase maternity / paternity insurance scheme, and the allocations from the staff suspensions fund and from the exceptional circumstances / schools in financial difficulty fund, in support of maintained primary schools, net of the underspend in the School Improvement (SIMB Grant) fund, which is discussed further in Document PG Appendix 4a.
- + £24,152 estimated saving from the reduction in NNDR (business rates), following academy conversions.

Details of the Item for Consideration

- + £245,163 estimated saving from the 2022/23 Growth Fund provision. Please see Document PA for more information on Growth Fund spending.
- - £650,000 final spending of the long-standing specific budget provision, which has been held within de-delegated funds, to support the cost of the deficit held by a maintained school converting to academy. This school converted to academy in summer 2022.

Taking account of the spending of the £650,000 academy conversion provision, where the timing of this spend was uncertain and so was not included in 2022/23 planned budget as expenditure, the current estimate of the total value of balance to be held at 31 March 2023 within the Schools Block is materially very similar to the value that was originally estimated and presented to the Schools Forum on 12 January 2022.

We forecast that the 2022/23 planned budget for the **Early Years Block** will be under-spent by £0.775m (1.9%). Including the additional £0.175m of balance brought forward from 2021/22, we estimate that the value of balance to be held at 31 March 2023 within the Early Years Block will be £0.950m greater than the value originally estimated and presented to the Schools Forum on 12 January 2022. Whilst it must be stressed that the updated position is still significantly estimated, the main reasons for the improvement against the original estimates, are:

- The value of balance brought forward from 2021/22 was £0.175m higher than the estimates presented to the Schools Forum on 12 January 2022. In context of the total size of the Early Years Block (£41m) and that, for the planned budget that is presented to the Forum at the beginning of January each year, we are fully estimating the cost of allocations to providers delivering the entitlements in the spring term, prior to the collection of the January Census, this value of variance is not materially substantial.
- Historically, prior to 2020/21, we have been funded at Early Years Block-level for a greater number of 3&4-year-old entitlement hours than providers have actually delivered. We are funded at Early Years Block level on the delivery numbers that are recorded by providers in the January Censuses e.g. for 2022/23, we are funded 5/12s on the January 2022 Census and 7/12ths on the January 2023 Census. We fund providers however, on a 3 terms count taken in May, October and January e.g. for 2022/23, providers are funded on counts taken in May 2022, October 2022 and January 2023. In any financial year, the cost of summer term entitlement delivery exceeds the funding that the Authority receives (e.g. for 2022/23, we have funded providers on the May 2022 count, but the Early Years Block is funded on the January 2022 Census, which records much lower numbers). However, the cost of autumn term delivery is much lower than the funding that the Authority receives (e.g. for 2022/23, we have funded providers on the October 2022 count, but the Early Years Block will be funded on the January 2023 Census, which will record higher numbers). Due to the way this system works, and our profile of numbers, the net of the loss in summer vs. the gain in autumn has historically been to our advantage. This has been one of the contributing factors in our ability to set higher universal base rates at the same time as higher deprivation and SEND supplement rates for providers in our 3&4-year-old Early Years Single Funding Formula.

In 2021/22, on an exceptional basis in response to the COVID-19 pandemic, the DfE's changed the Early Years Block funding methodology, from using the January Censuses to using the 3 termly counts that local authorities recorded. As such, the benefit that we would normally achieve was fully removed. We planned for this, and absorbed its impact. Over the full period of the COVID-19 pandemic, entitlement delivery numbers have been distorted, and, in setting out our 2022/23 planned budget, we explained that we were not clear that the benefit we had previously enjoyed would still be present, or would be present to the same degree. We explained how we predict that the reduction in 3&4-year-old entitlement numbers, as a result of demographic trends, is likely to reduce (and possibly fully remove) over time the benefit, as it appears to have done in respect of the 2-year-old entitlement. Therefore, one of the actions we took to continue to protect the Early Years Block was not to assume any benefit in 2022/23.

We have now collected May 2022 and October 2022 entitlement delivery numbers. Using this data, we estimate, at least for 2022/23, that the benefit is still present, but has been reduced by about a 1/3rd. The £0.521m estimated underspending in 3&4-year-old entitlement allocations principally is the result of this, and this is the main reason for the improvement in the overall Early Years Block surplus balance position.

- We continue to see underspending (estimated at £148,000) in the resources allocated to providers via the Disability Access Fund (DAF). For 2 years now we have increased the value of DAF allocation per child to £1,000 (from the DfE's minimum of £800) and we expect to continue this in 2023/24, using balances if necessary to afford this. As there is substantial cross-over between DAF and Early Years SEND Inclusion (EYIF) funds, we are also proposing to use a proportion of the DAF balance that has accrued to help meet the cost of our EYIF fund in 2023/24, which is increasing due to a larger number of claims.

In presenting an estimated £0.950m improvement in the Early Years Block balance, we remind the Schools Forum that, within the 2022/23 planned budget, we continued to transfer to the High Needs Block £0.332m of contribution that the Early Years Block normally makes to the provision of early years SEND services. This

Details of the Item for Consideration

transfer has sought to protect the Early Years Block, at a time when this Block's position was uncertain and was appearing to be under stress, including as a result of the impact of the COVID-19 pandemic. We do not propose to retrospectively charge this £0.332m contribution to the Early Years Block in 2022/23, meaning that the value of balance to be carried forward at 31 March 2023 within the Early Years Block is increased to provide additional funding to be used in support of the pressures that will need to be managed going forward. We do propose however, that the £0.332m on-going budget is returned to the Early Years Block from April 2023.

We forecast that the 2022/23 planned budget for the **High Needs Block** will be under-spent by £2.35m (2.3%). Including the additional £1.282m of balance brought forward from 2021/22, we estimate that the value of balance to be held at 31 March 2023 within the High Needs Block will be £3.631m greater than the value originally estimated and presented to the Schools Forum on 12 January 2022. Members will identify from Appendix 1 that there are a number of movements, both over and under spends, against the planned budget that was presented to the Schools Forum in January 2022.

Firstly, members are asked to note that the figures in Appendix 1 for the High Needs Block are based on estimates of spending between December 2022 and March 2023. There continues to be a significant amount of structural change, which is taking place on a backdrop of continued growth in the numbers of EHCPs and places creation. These changes combine to mean that it is challenging to forecast with certainty what the profile of spend will be for the rest of this financial year. This uncertainty knocks into the setting of the planned budget for 2023/24, where the 2022/23 financial year spending base will be used in certain areas e.g. mainstream EHCPs and Other Local Authority, Non Maintained Special School and Independent placements, as a starting point to estimate the budget required going forward. Variances in actual vs. estimated spending growth in the period December 2021 to March 2022, have contributed to the movements in spending now reported in Appendix 1 against the 2022/23 budget. To highlight some specific points from Appendix 1:

- The forecast incorporates the £0.920m additional spending that the Authority presented to the Schools Forum in July 2022 (the Authority's 'inclusion investment support plan').
- The budget provision for additional specialist places creation is estimated to under-spend by £1.78m. Places creation is presented in more detail in Document PH (Annual SEND Sufficiency Statement).
- We reported to the Forum in January 2022 that our High Needs Block allocation for 2022/23 was (unexpectedly) increased via £3.85m of supplementary funding, allocated for the Authority to use flexibly, but primarily, to support the cost of the 1.25% National Insurance Levy, as well as the extra study hours included as part of the Government's education recovery plan for post-16 students with high needs. The £3.85m was not allocated within the 2022/23 budget that we agreed on 12 January. However, we presented to the Forum in March details of how our rates of top-up funding for EHCPs were further increased, and broadly how we expected to use this funding. Our estimates of spending on further education post 16 placements, and placements in independent settings, include assumptions about additional costs in relation to the National Insurance Levy and to the extra post 16 study hours. It is not possible to separate within our spending forecast the proportion of provider funding that is specifically met from the £3.85m. As such, this is shown as unspent, but with the spending as a consequence of the uplift of top-up funding, the cost of extra study hours, and the additional costs of placements in independent provisions as a result of the National Insurance Levy, included in respective spending lines. In holistic terms, the £3.85m has been substantially used to offset the impact of the growth in cost of mainstream EHCPs and of independent placements. Combined, these two spending areas are of most concern to the Authority, when looking at the future trajectory of the High Needs Block.
- We forecast that the cost of mainstream EHCPs, including the cost of the SEND Funding Floor, will exceed the planned budget by £1.74m (spend +39% on 2021/22). The Authority has seen continued significant growth in the number of EHCPs over the last 12 months. The subsequent growth in the cost of top-up allocations is combined with the substantial growth in the cost of the SEND Funding Floor (growth from £1.7m in 2021/22 to £2.3m at October 2022, with further growth to come in 22-23). We forecast that the cost of independent, out of authority and non-maintained special school placements will exceed the budget by £3.00m (spend +31% on 2021/22). This is a very estimated figure at this time. This budget typically is volatile and can change significantly, depending on high cost placements.
- The £1.0m provision for the EHCP Banded Model impact is shown as unspent. However, this is for simplicity of reporting, and because specific spending is difficult to isolate. This £1.0m provision has been held in order to support the embedding of the EHCP Banded Model, especially the expansion of its 'stacking' facility (where the SEND Panel can add more than one value of Band funding together to find the best fit for an individual EHCP in any setting). In Appendix 1, the cost of stacking, and of other band amendments, are included within respective Place-Plus spending lines. As an example of the growth of stacking, in November 2021, 24 EHCPs in School-Led Resourced Provision, LA-Led Resourced Provision and Special Schools received stacking. This has increased to 106 in November 2022.

Details of the Item for Consideration

We forecast a £0.281m surplus balance within the **Central Schools Services Block (CSSB)** at 31 March 2023. This is currently based on estimates of services spending. A reconciliation will take place within the Council's year end closedown process and we will present to the Forum in July 2023 the final position.

In the 2022/23 planned budget, we held a £50,000 'structural resilience' contingency, the purpose of which was to ensure that the CSSB does not 'overreach' itself going forward, as the additional historic commitments funding, that we have benefited from in recent years, reduces and then finally ceases in the very near future. We do not currently expect the £50,000 provision to be spent in 2022/23, so this will carry over to be added to the £0.231m surplus balance that was brought forward from 2021/22.

Allocation and Retention of Balances to be Brought Forward from 2022/23

Appendix 2:

a) Shows (repeats from Appendix 1) the values of balances that are currently estimated to be carried into 2023/24. It then shows the values that are already committed as a result of previous decisions, and

b) Puts forward indicative proposals / considerations for the allocation and / or retention of the remaining balances. The Forum will be asked to make final recommendations on this on 11 January.

Schools Block (£5.319m)

- A balance of £0.797m held in de-delegated funds for maintained schools is estimated to be retained. A breakdown of this balance is provided in the separate report (Document PI Appendix 2). The Authority proposes to release a proportion of this balance (£0.100m) to support the cost of the primary phase maternity / paternity insurance scheme in 2023/24, and also to use the £0.122m School Improvement (SIMB) fund balance to retain the contribution at the 2022/23 value. The balance will also be used to support, as priority, staff suspension and exceptional circumstances requests, as well as any costs arising from new deficits held by sponsored primary academy converters, as the Authority continues to propose that no new budget is de-delegated for this purpose. The rest of the balance is ring-fenced and retained.
- £1.296m of balance relating to the Growth Fund, which is ring-fenced and is proposed to be retained to support Growth Fund costs, both in 2023/24 and on an on-going basis, including to be available to support schools and academies via the new flexibilities (for the management of falling rolls and 'surplus places') that are expected to be brought into Schools Block arrangements, following the most recent National Funding Formula (NFF) consultation. This consultation strongly put forward the view that local authorities retain Growth Fund responsibilities under the NFF. Retaining this surplus balance will help, given that there are uncertainties currently on how growth will be funded (with the concern that the proposed 'netting off' of pupil numbers growth from reduction may result in insufficient funding).
- £0.500m of balance relating to the Falling Rolls Fund (FRF) for the primary-phase. We will present a final position statement for 2022/23 to the Forum in March 2023. Based on current modelling, we anticipate that no primary-phase schools or academies will be eligible. The £0.500m is proposed to be retained to support FRF costs in 2023/24, but also to be available to support schools and academies via the flexibilities (for the management of falling rolls) that are expected to be brought into Schools Block arrangements.
- £0.421m of balance relating to primary phase £GUF monies. Whether this funding is allocated into the 2023/24 budget to support the full mirroring of the National Funding Formula, based on the October 2022 Census dataset, will be discussed further with the Schools Forum on 11 January. This will be the immediate priority use of this funding. If not used for this purpose, we propose that the £0.421m is retained and held alongside the Falling Rolls Fund and Growth Fund balances above, to combine to create a sum of Schools Block funding that is available to support primary schools and academies via the expected new flexibilities for the management of falling rolls and surplus places. Falling rolls is a significant issue for the primary phase, and we take the view that we would wish to see how the expected new flexibilities could be used, before committing this balance elsewhere to more general formula spending.
- The Appendix 2 balance figure currently assumes that the cost of our Schools Block arrangements in 2023/24 exceed our 2023/24 DSG Schools Block allocation by £0.101m. This is the current position, prior to calculating final formula funding allocations for schools and academies using the October 2022 Census dataset. Members therefore, should treat this as an estimate at this stage.
- A balance of £2.204m of reserve is then estimated to be retained, again subject to discussions with the Forum on 11 January regarding the affordability of our formula funding proposals when calculated using the October 2022 Census dataset. £2.204m is 0.45% of the Schools Block. In particular, we identify that we are likely to need to use a proportion of this reserve (TBC) to initially cover the cost of changes in NNDR (Business Rates) in 2023/24, prior to being reimbursed through the APT process in future years.

Details of the Item for Consideration

Early Years Block (£4.216m)

- A balance of £0.072m in de-delegated funds is estimated to be retained across the financial year-end. This balance is ring-fenced and is proposed continue to be retained, as it is in the Schools Block.
- A balance of £0.741m in the Disability Access Fund (DAF) is estimated to be carried forward into 2023/24. We have previously repeatedly under-spent this fund. We increased the value of the DAF allocation paid per child in 2021/22, from £615 to £1,000, with the expectations that this increase will help support provider costs, will complement the Early Years Inclusion Fund, and will also help to begin to release the surplus balance to providers. We will continue to keep this balance, and action to spend it, under review. As there is substantial cross-over between DAF and Early Years SEND Inclusion (EYIF) funds however, we are proposing in 2023/24 to use a proportion of the DAF balance that has accrued to help manage the cost of our EYIF fund, which is increasing due to a larger number of claims. In practical terms, this means using an estimated £0.100m of the DAF surplus balance to cover the cost of 2023/24 DAF allocations.
- A sum of £0.845m is estimated to be needed to be available to secure the delivery of the Early Years Single Funding Formula that we have indicatively modelled for 2023/24, prior to the DfE's announcement of the settlement and formula funding arrangements. Please see Document PB for further information.
- At this time, on current calculations and using available data, we estimate an unallocated balance of £2.558m (6% of the Early Years Block) will be retained to support the pressures that will need to be managed within the Early Years Block going forward from April 2024. This includes bringing our EYSFF spending more in line with our Early Years Block annual allocation, rather than relying substantially on reserves, and managing the impact of this transition on rates of provider funding.

High Needs Block (£25.688m)

- Forum members are reminded that the Authority presented reports in May (Document OM) and July (Document OR) 2022, following discussions regarding the use and retention of the High Needs Block surplus balance that was carried forward from the 2021/22 financial year. The July 2022 report set out a plan for £920,000 of investment, in 3 areas, in support of inclusion. This initial investment will run to the end of the 2022/23 academic year, where it has been agreed that a review of impact will inform whether the High Needs Block surplus balance continues its investment in these areas. Currently, for budget planning purposes, it is assumed that the £0.920m will continue for a full financial year in 2023/24.
- We currently estimate that we may need to earmark an additional £6.709m of the balance to establish a planned budget for the High Needs Block for 2023/24 that balances back to zero. This figure will be updated / confirmed within the information that will be presented to the Forum on 11 January. In total, with the addition of the £0.920m, we currently estimate that £7.629m (30% of the forecasted surplus balance) may be deployed during 2023/24. To highlight here: £0.920m of this estimated overspend is the result of deliberate additional inclusion plan spending, which is to be reviewed, and c. £4.0m is budget for new specialist places, which we do not expect to see full spending of in 2023/24 but which needs to be structurally built into the budget. Also to clarify, this estimate assumes that our proposals for high needs funding in 2023/24, including top-up uplift and the control of the SEND Funding Floor, are actioned.
- On this basis, £18.059m of surplus balance would remain at March 2024. We will present to the Forum on 11 January an updated DSG Management Plan, which will include a future year estimate of the High Needs Block. This estimate currently clearly indicates the continuation (and acceleration) of a substantial overspending in our High Needs Block, which will require significant mitigating actions, discussion on which will need to form part of our 2024/25 DSG budget setting cycle. We are moving into a period where the risk of cumulative deficit in our DSG account is high.
- In this context, the Authority at this time does not plan any other significant use of the High Needs Block surplus. As members are aware, the planned budget is constructed on a series of estimates and we try to take a prudent approach to these estimates. However, a first call on the £25.688m will be meeting in year the cost of change, as well as supporting any unexpected costs that may arise across 2022 and 2023 after the planned budget for 2023/24 has been agreed. The second, perhaps more important, call on the £25.688m balance will be supporting the avoidance of cumulative deficit in the High Needs Block over the medium term. We are also conscious of two significant uncertainties, that are likely to have financial implications for our High Needs Block going forward, a) the outcomes of the national reviews on SEND, EHCP and Alternative Provision systems and funding - it is likely that changes that come from these reviews will alter the cost base that our High Needs Block will need to manage, and b) whether the annual increase in High Needs Block funding allocated by the DfE keeps pace with increasing costs, linked with the rate of continued growth in our costs, especially from the continued growth in the number of EHCPs and the number of specialist places created, which is uncertain. On current information, we would assume that funding will not keep pace with costs growth.

Details of the Item for Consideration

Central Schools Services Block (£0.281m)

- In previous years, we have agreed that CSSB surplus balances are transferred for use within the Schools Block but that, where a CSSB surplus has been transferred previously, we also expect, if a deficit balance is subsequently held within the CSSB, the Schools Forum will agree for the Schools Block balance to write off this deficit, up to the cumulative value of the surplus balance previously transferred. We do not propose to continue this policy from 2022/23 onwards, meaning that the surplus balance that is forecasted to be held within the CSSB is expected stay with the CSSB. This change of approach will better support us to meet the pressures that we anticipate will be present within the CSSB as a result of the movement to the final cessation of historic commitments funding, which was worth £0.225m in 2022/23 (reducing to £0.18m in 2023/24).
- On current estimates, £0.023m of surplus balance will be allocated into the 2023/24 planned budget, to continue existing commitments uplifted for pay award and inflation, and to meet the increased cost of copyright licences for mainstream primary and secondary schools and academies, in combination with the 2023/24 CSSB allocation received from the DfE. This leaves an estimated £0.258m, which will be retained to support future sustainability.

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

These balances must be spent on DSG functions and in accordance with the Regulations.

Recommendations

Members are asked to consider whether sufficient information has been provided to enable final recommendations to be made on 11 January on the allocation and / or retention of estimated DSG balances.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – 2022/23 DSG Spending Forecast Report

Appendix 2 – Statement of uses & retention of balances forecasted to be carried forward into 2023/24

Contact Officer (name, telephone number and email address)

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	Schools Block	Early Years Block	High Needs Block	Central Schools Services Block	Total	Comments
Total of Balances (by Block) carried forward from 2021/22 into 2022/23	6,683,881	4,175,694	23,021,300	231,158	34,112,034	As confirmed with the Schools Forum 14 September 2022
Total of Balances (by Block) estimated to be carried forward from 2022/23 into 2023/24	5,319,339	4,216,100	25,688,312	281,158	35,504,909	Balances are informally "ring-fenced" by Block
<i>Balance as a % of 2023/24 Block value</i>	<i>1.0%</i>	<i>9.7%</i>	<i>23.0%</i>	<i>7.9%</i>	<i>5.3%</i>	
1) Proposed to be allocated within the 2023/24 Schools Budget for specific agreed additional expenditure						
Balance to be used in support of NNDR (Business Rates) cost increases until reimbursement via the APT	TBC				0	NNDR Re-evaluation April 2023. Reimbursement is expected in future years via APT
Balance to be used for Disability Access Fund (DAF) allocations in 2023/24		100,000			100,000	Please see Document PI (Early Years Block central funds)
Balance to be used in support of the 2023/24 Early Years Single Funding Formula (protection of UBRs) - TBC estimated		845,315			845,315	Please see Document PB (2023/24 EYSFF update)
Financing of the HNB Inclusion Plan			920,000		920,000	As discussed with the Forum July 2022. Indicatively planned full year spend
Total proposed to be allocated into the 2023/24 Schools Budget for specific additional expenditure (estimated)	0	945,315	920,000	0	1,865,315	
2) Proposed either to be allocated to the 2023/24 Schools Budget in order to remove a deficit, or an underspending (surplus) proposed to be added to balances to be carried forward						
2023/24 Schools Budget Support or Retention (Underspend). A negative = surplus retention into 2024/25 - TBC	100,836		6,708,910	23,241	6,832,987	Confirmed figures are not yet available. Further discussion 11 January
Total allocated to remove a deficit from the 2022/23 Schools Budget or to add an under-spend to balances	100,836	0	6,708,910	23,241	6,832,987	
3) Proposed Balances to be retained at 1 April 2023						
Retention of the De-Delegated Funds net total of balances forecasted to be held at 31 March 2023	797,083	71,709			868,792	Retained to support the cost of de-delegated funds in 2023/24 & on-going
Retention of the earmarked Disability Access Funds (DAF) monies within the Early Years Block		640,715			640,715	Estimated balance net of £100k allocation above.
Balance remaining of the Schools Block GUF primary phase funding carried from 2022/23	421,260				421,260	To support primary phase re. expected new flexibility in the removal of surplus places
Retention of the Estimated Falling Rolls Fund balance carried forward from 2022/23 (subject to further discussion)	500,000				500,000	Allocations for 2022/23 will be presented in March 2023. However, no spend anticipated
Retention of the Estimated Growth Fund balance carried forward from 2022/23	1,296,284				1,296,284	Retained to support Growth Fund cost in 2023/24 & on-going & new expected flexibility
Block Resilience Reserve	2,203,877	2,558,361	18,059,402	257,917	23,079,557	Held for for DSG management planning / funding support in future years.
Total of Balances Proposed to be Retained at 1 April 2023	5,218,503	3,270,785	18,059,402	257,917	26,806,607	
<i>Retained Balance as a % of 2023/24 Block value</i>	<i>1.1%</i>	<i>8.1%</i>	<i>17.8%</i>	<i>0.0%</i>	<i>4.4%</i>	
GRAND TOTAL BY BLOCK	5,319,339	4,216,100	25,688,312	281,158	35,504,909	

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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 presents the annual statement to the Schools Forum on the sufficiency of specialist places for SEND.

Date (s) of any Previous Discussion at the Forum

This statement was last presented to the Schools Forum in December 2021.

Background

This statement is presented as per the schedule of high needs information, which was agreed with the Schools Forum on 14 October 2020.

Please see Appendix 1.

Details of the Item for Consideration

Please see Appendix 1

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

This is an item for information.

The Authority will present on 11 January an update of the fuller DSG Management Plan, which will show the estimated position of the High Needs Block over the next 4-year period.

Recommendations

Recommended – Members are asked to consider and to note the information presented in the report, in advance of the 11 January meeting.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Annual Sufficiency Statement SEND

Contact Officer (name, telephone number and email address)

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Schools Forum Document PH Appendix 1
SEND Places Sufficiency Statement November 2022

Introduction

1. Bradford Metropolitan District Council (the 'Local Authority' or the 'Authority') has a statutory duty under The Education Act 1996 Section 14(1) to ensure a sufficient number of school places for all children and young people who are resident within the Bradford District. The Authority has specific duties to ensure that there is sufficient specialist provision available for children and young people with Education, Health and Care Plans (EHCPs), where their EHCPs determine that their needs should be met in specialist provision.
2. This annual statement to the Schools Forum sets out the analysis and processes, which enable the Local Authority to plan and to ensure the sufficiency of specialist places over the next three years. This statement highlights the projected scale of growth in the number of specialist places required to meet the projected increase in demand. It considers the number of places by type of provision that is projected to be required, if the current distribution of specialist places - between enhanced provisions (Resourced Provisions), local maintained special schools and special school academies, and mainstream maintained schools and academies - is projected into the future in line with the projected growth in demand for specialist places.
3. Further information can be found in the Strategic Plan 22 – Sufficiency of Specialist Places for Children and Young People of Bradford. This strategy is updated and published online, on an annual basis.

Background

4. The trajectory for the Bradford District remains unchanged with a continued increase in demand for Special Educational Needs and Disabilities (SEND) provision. Furthermore, it is projected that demand will continue to grow across all sectors.
 - The total number of Education, Health and Care Plans (EHCPs) for 0-25 year olds across the Bradford District was recorded as 5,309 on 22 September 2022. This has increased from 4,915 on 26 November 2021, 4,619 recorded in November 2020 and 3,786 recorded in October 2019. As shown in Appendix 1 (in headline), the total number of EHCPs has further increased to 5,452 at 24 November 2022.
 - The number of requests for Education, Health and Care Plan assessments was recorded at 1,322 between September 2021 and September 2022. This is a significant increase of 38.7% from the 953 requests received between September 2020 and September 2021.
 - Of the 5,309 children and young people with an EHCP on 22 September 2022, 3,626 (68.3%) are of statutory school age. This percentage remains in line with last year's percentage of 68.9%.
 - The number of children and young people on SEND Support aged between 0 – 25 years has decreased by 0.17% between October 2021 and September 2022. This decrease being significantly lower than the decrease of 6.14% seen between October 2020 and October 2021.
 - Of the 13,155 children and young people aged between 0 - 25 years recorded on 22 September on SEND support, 12,101 (92%) are of statutory school age, a slight increase on the 90.6% recorded last year. The total number of SEND support pupils has increased to 13,267 recorded on 24 November (Appendix 1).

National Statistics at January 2022 (taken from the DfE Statistical Release; the SEN2 return and Census Data) compared with the Bradford District

National:

- 4% of all pupils in schools in England were recorded as having an Education, Health and Care Plan (EHCP), increased from 3.7% recorded at January 2021 and 3.3% recorded at January 2020.
- A further 12.6% of pupils were recorded as SEND support, increased from 12.2% recorded at January 2021 and 12.1% recorded at January 2020.
- The most prevalent primary need recorded for pupils with an EHCP is for Communication and Interaction including Autistic Spectrum Disorders. For pupils with SEND support the most prevalent primary need recorded is for Speech, Language and Communication Needs. Both continue a trend since 2016.
- In England, SEND is more prevalent in boys than girls, with boys representing 72.8% of all pupils with an EHCP and 63.5% of pupils with SEND support.

Bradford:

- 3.6% of all pupils in schools in Bradford were recorded as having an Education, Health and Care Plan, increased from 3.4% recorded at January 2021 and 3.0% recorded at January 2020.
 - A further 13.0% of all pupils were recorded as SEND Support, representing a slight increase from the 12.7% recorded at January 2021, but against 13.2% recorded at January 2020.
 - The most prevalent primary need for pupils in the Bradford District with an EHCP is for Communication and Interaction Needs including Autistic Spectrum Disorders, which reflects the same trend as the national picture. For pupils with SEND support, the most prevalent primary need recorded is for Moderate Learning Difficulties (MLD), closely followed by Speech, Language and Communication Needs. Again, this picture has remained static.
 - As with the national trend, SEND is more prevalent in boys than girls in the Bradford District, with boys representing 71.6% of all pupils with an EHCP and 64% of pupils with SEND support.
5. During the academic years 2020 to 2021 and 2021 to 2022, the Local Authority has created a further 189 specialist places across the District. Please see Appendix 2 for full details of the additional places that have been created.

Current Position

6. The table below shows the current number of registered specialist places across the Bradford District and the type of provision in which they are delivered.

Provision Type	Early Years	Primary	All Through	Secondary	Total
Special School & Special School Academies	0	521	114	846	1,481
Resourced Provisions School Led	0	180	0	153	333
Resourced Provisions Local Authority Led	0	126	0	68	194
Early Years Enhanced Specialist Provision (headcount not FTE)	121	0	0	0	121
Total Registered Places	121	827	114	1,067	2,129

7. The table below shows the occupancy of these specialist places across the Bradford District in October 2022.

Provision Type	Number of Registered Places	Number of Occupied Places	Occupancy %
Special School & Special School Academies	1,481	1,462	99%
Resourced Provisions School Led	333	262	79%
Resourced Provisions Local Authority Led	194	176	91%
Early Years Enhanced Specialist Provision	121	105*	87%*
Total Occupancy	2,129	2,005	94%

**The occupancy data has been affected by the recent commissioning of 10 additional EYESP places at Hirst Wood Nursery School, which at the time of this data being collated had yet to be filled. If these 10 places are excluded from the data, the percentage occupancy of the EYESP's is 95% and the overall occupancy of specialist places is 95%.*

The table below, extracted from the Sufficiency Statement presented to the Schools Forum this time last year, shown the occupancy of specialist places across the Bradford District in November 2021.

Provision Type	Number of Registered Places	Number of Occupied Places	Occupancy %
Special School & Special School Academies	1,457	1,437	99%
Resourced Provisions School Led	323	260	80%
Resourced Provisions Local Authority Led	194	141	73%
Early Years Enhanced Specialist Provision	111	118	106%
Total Occupancy	2,085	1,956	94%

8. The data clearly evidences that the number of children and young people with an EHCP in the Bradford District continues to rise.

- The number of children and young people with an EHCP aged between 0 to 25 years has increased by 9.3% between November 2022 and November 2021. The comparable increase between November 2021 and November 2020 was 6.4%.
- The number of children and young people with an EHCP aged between 5 to 15 years (statutory school age) has increased by 9% between October 2021 and September 2022. This is a notable acceleration on last year's increase of 3.98% between October 2020 and October 2021.
- Requests for assessment have risen from 813 between October 2019 and October 2020, 958 between October 2020 and October 2021 to 1322 between September 2021 and September 2022.

- 7.4% of children and young people within the Bradford District with an EHCP are currently accessing 'out of authority' provision. In proportionate terms, this figure has remained relatively unchanged; being recorded at 7% for the last two years. In order to meet the needs of children and young people with SEND residing within the Bradford District, it is sometimes necessary to place them in specialist provisions outside our Local Authority area, as well as in independent provisions. Whilst this is sometimes required, it is not our preferred option, as the impact on placing children and young people away from their local communities is immeasurable. Furthermore, securing specialist places outside of the Local Authority area leads to significant additional costs. We currently estimate that our spending on all out of authority placements, including placements in independent and non-maintained provisions, will increase by 31% in 2022/23. This is one of the major causes of financial pressure within the High Needs Block, which we must seek to control. This is a pressure that all local authorities are currently facing.

Forecast (and Methodology)

9. Our modelling clearly indicates that additional specialist places are required to be developed over the coming years in response to continued growth in the number of EHCPs and wider demographic changes in the school population. There are many variables that affect the current and future projections of the number of specialist places required in order to meet the needs of children and young people with SEND across the Bradford District, some of which are listed below:

- There are a significant number of children and young people across the Bradford District on SEND Support. The data shows that there has been a marginal reduction in the number of children and young people between 0 – 25 over the last year compared with the previous year's data. Projections show that a proportion of this cohort will transfer onto a EHCP in the future, therefore increasing the overall EHCP cohort.
- Increase in the number of EHCPs.
- Increase in the number of EHCP assessments.
- High levels of occupancy in established specialist provisions.

10. We forecast that once a child or young person has moved into the EHCP cohort they will remain in that cohort. By analysing the flow of children and young people across each stream of SEND provision, we forecast that there will be an increase in the number of children and young people that will require access to a specialist place. Using a growth model for EHCPs, based on an average seen in the past three year's data, the Local Authority projects the following:

- The number of children and young people between 0 - 25 with an EHCP in Bradford will increase by at least 8.05%, or 427.
- Based on the average over the past two years, 68.4% of the above cohort will be of statutory school age. This would mean that by October 2023, this cohort would amount to 3,923.

11. Our modelling clearly indicates that additional SEND specialist places are required to be developed, in response to the continued growth in the numbers of children and young people requiring EHCPs and access to a specialist placement, and also taking into account the current/projected high levels of occupancy of existing established provisions. Our forecast is regularly updated and tested against the latest available data including the tracking of the SEND cohort throughout all phases of education.

Summary & Conclusions

12. Our current projection remains unchanged on that previously presented, in that we will require an additional 100 to 120 specialist places within the current 2022/23 academic year, with these places being delivered across both the special school sector and within resourced provisions.

13. Our projections further show, as we have previously presented, that we will need to increase specialist places again by 100 to 120 for the 2023/24 academic year. This is the minimum number of specialist places that we project will be required to be developed in order to meet demand and to control (not increase reliance) on more expensive ‘out of authority’ placements.

14. The Local Authority’s data continues to evidence that a number of key pressure points exist across the District. In order to address these pressure points, we have identified that the following additional provision is required:

- Additional resourced provision places for secondary aged children and young people with a primary need of Communication and Interaction including Autistic Spectrum Disorders (ASD) and Social, Emotional and Mental Health (SEMH).
- Additional special school places for primary and secondary aged children and young people with a primary need of Communication and Interaction including Autistic Spectrum Disorders (ASD), Severe Learning Difficulties (SLD) and secondary aged children with Social, Emotional and Mental Health (SEMH).

15. The Local Authority’s immediate actions for the current academic year 2022/2023, in response to these projections and the identified key pressure points are:

- The Local Authority is currently undertaking numerous schemes of work to provide in excess of 100 additional specialist places, for both primary and secondary aged children and young people within special schools and resourced provisions, with the most prevalent primary need as detailed above.
- In order to address some of the above key pressure points, the Local Authority is already seeking or has approval to undertake the following schemes of work to provide additional specialist places:

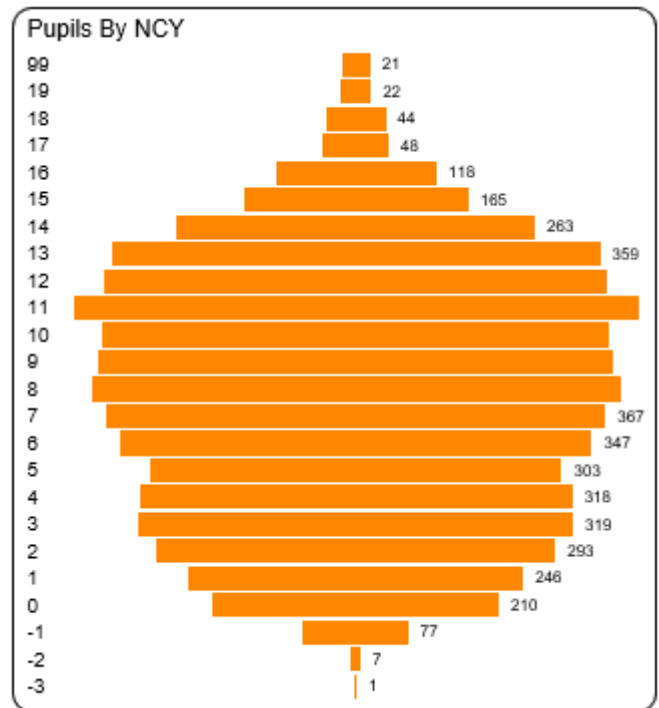
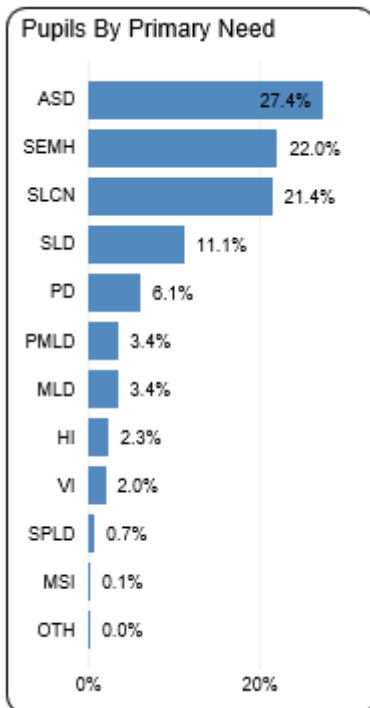
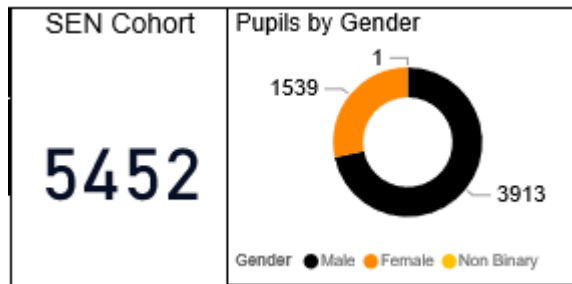
Phase of Education	Number of Additional Specialist Places	Primary Need
Primary - RP	12	Communication and Interaction including Autistic Spectrum Disorders
Secondary - RP	24	Social, Emotional and Mental Health
Secondary – Special School	50	ASD, SLD and PMLD

- Discussions are ongoing with numerous schools and academies in the relevant areas regarding the development of further specialist places in the District.
- The Local Authority will include within the High Needs Block planned budget for the 2023/24 financial year funding to meet the revenue cost of additional places.

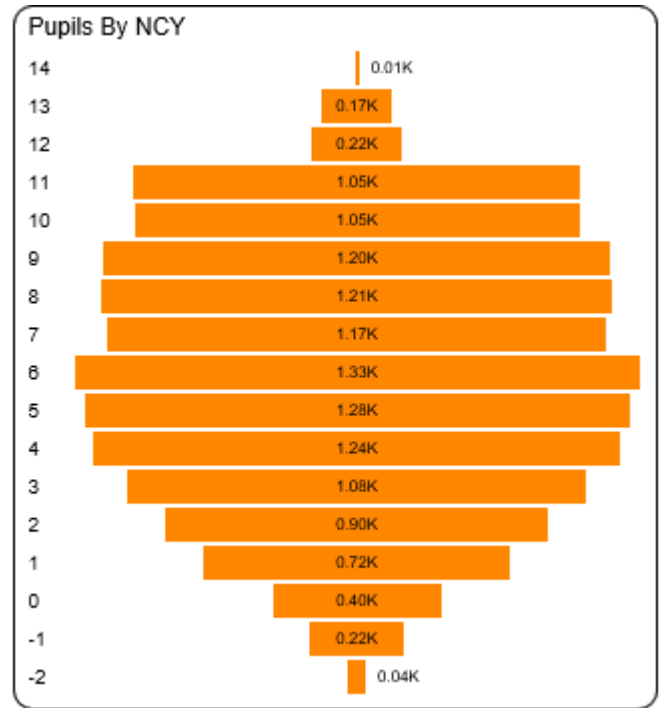
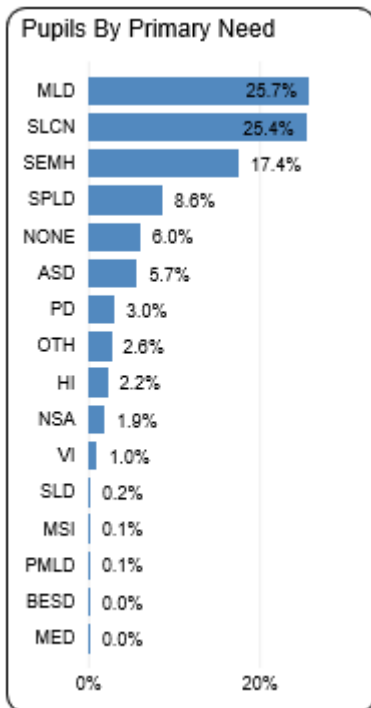
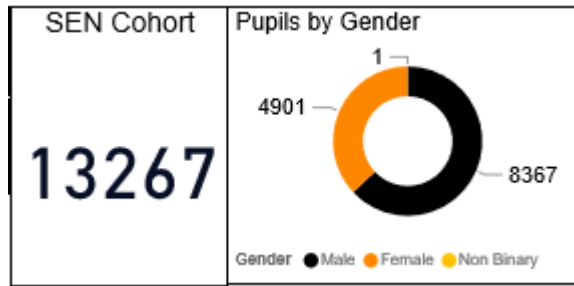
Appendix 1

The data below has been taken from the SEND Dashboard. This is a live database used by Children Services. The data is constantly updated to reflect the changing situations of the children and young people within the Bradford District. The data below was extracted on 24 November 2022.

The below illustrations show the total number of children and young people with an EHCP across the Bradford District. The total number is then further divided into male/female, primary need and the National Curriculum year group.



The below illustrations show the total number of children and young people on SEND support across the Bradford District. The total number is then further divided into male/female, primary need and the National Curriculum year group.



Appendix 2

List of new provisions/expansions opened between 2020 – 2021 and 2021 - 2022

Bradford East Constituency

Name	Primary Need	Provision	Primary/ Secondary/ All Through	No. of Additional Places	Ward	Year Places Created
Holybrook Primary School	Social, Emotional and Mental Health	RP-SL New Provision	Primary	16	Eccleshill	2020 - 2021
Fagley Primary School	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-LA New Provision	Primary	12	Eccleshill	2020 - 2021
Beechcliffe Thackley	Social, Emotional and Mental Health	Special School	Secondary	24	Idle and Thackley	2021 - 2022

Bradford South Constituency

Name	Primary Need	Provision	Primary/ Secondary/ All Through	No. of additional Places	Ward	Year Places Created
Co-op Academy Southfield Phase 1	ASD, SLD and PMLD Expansion of existing provision	Special School	Secondary	45	Great Horton	2020 - 2021

Bradford West Constituency

Name	Primary Need	Provision	Primary/ Secondary/ All Through	No. of additional Places	Ward	Year Places Created
Thornton Primary	Social, Emotional and Mental Health	RP-LA New Provision	Primary	12	Thornton and Allerton	2020 - 2021
Oasis Academy Lister Park	Speech Language and Communication Needs	RP-SL Expansion	Secondary	6	Manningham	2021 - 2022

Shipley Constituency

Name	Primary Need	Provision	Primary/ Secondary/ All Through	No. of additional Places	Ward	Year Places Created
Hirst Wood Nursery School	Generic 0-5 years	EYESP New Provision	Nursery	10	Shipley	2021 - 2022
Cottingley Primary School	Social, Emotional and Mental Health	RP-SL Expansion	Primary	4	Bingley Rural	2021 - 2022

Keighley Constituency

Name	Primary Need	Provision	Primary/ Secondary/ All Through	No. of Additional Places	Ward	Year Places Created
Long Lee Primary School	Social, Emotional and Mental Health	RP-SL Expansion	Primary	6	Keighley East	2020 - 2021
Parkwood Primary School	Communication and Interaction	RP-SL	Primary	12	Keighley East	2020 - 2021

	Inc. Autistic Spectrum Disorder	New Provision				
The Holy Family Catholic School	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-SL Expansion	Secondary	4	Keighley Central	2020 - 2021
Worth Valley Primary School	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-SL New Provision	Primary	8	Keighley West	2020 - 2021
Oastlers	Social, Emotional and Mental Health	Special School New Split Site	Secondary	30	Keighley West	2020 - 2021

The total number of additional specialist places created across the Bradford District between 2020 and 2022 is 189.

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 asks Forum members to further consider the Authority’s proposals for retention of Schools, Central Schools Services and Early Years Block central and de-delegated items in the 2023/24 financial year, following the initial discussion had in the last Forum meeting and in advance of the 11 January meeting.

Date (s) of any Previous Discussion at the Forum

An initial report on funds proposed to be held in 2023/24 was presented to the Schools Forum at the last meeting (12 October 2022, Document OZ). From this report:

- Members representing maintained primary schools decided that de-delegation for the purposes of subscribing to Fischer Family Trust should continue from the Schools Block in 2023/24.
- Members did not request the review of any of the centrally managed funds presented in Document OZ.

The Authority has requested feedback from schools and academies, on centrally managed funds, within the autumn 2022 consultations, including on the criteria / methodology for the allocation of Growth Funding, Falling Rolls Funding and de-delegated funds for maintained schools. Feedback on these consultations is reported back to this meeting under separate agenda items.

Background / Context

Please refer to Document OZ 12 October 2022, which was written to initiate consideration of centrally managed funds to be held in the 2023/24 financial year.

Details of the Item for Consideration

Appendices 1 - 4 attached to this report set out for the Forum’s review the Authority’s indicative proposals for centrally managed funds to be held within the Schools Block, Early Years Block and Central Schools Services Block in the 2023/24 financial year.

- Appendix 1 – presents line by line information by block of the funds proposed to be held, the Authority’s recommendation on the values of these funds and how the 2023/24 proposed arrangements compare with 2022/23. This appendix also shows the balances that are currently forecasted to be held in each existing fund at the end of the 2022/23 financial year.
- Appendix 2 – presents more detailed information on the contributions (and changes vs. 2022/23) proposed for de-delegated funds held for maintained schools within the Schools Block for the 2023/24 financial year. This appendix also shows in more detail the balances that are currently forecasted to be held in each de-delegated fund at the end of the 2022/23 financial year.
- Appendix 3 – lists for clarity the purposes for which the Authority can retain Central Schools Services Block monies for the former Education Services Grant funded statutory responsibilities the Authority holds in respect of all state funded schools and academies.
- Appendix 4 (a and b) – presents further information on the de-delegation of funds from maintained primary and secondary schools for School Improvement, following the cessation of the School Improvement Monitoring and Brokering Grant (SIMB). The report includes information on the spending of the SIMB Grant in the 2020/21 and 2021/22 academic years, which has previously been requested by the Forum.

Details of the Item for Consideration

We wish to highlight the following 4 recommendations for 2023/24, which represent proposals other than the simple continuation (with uplift and / or other adjustment, where appropriate) of existing funds for continuing commitments following previously agreed approaches:

1. **Schools Block** – The continuation of de-delegation for the purpose of replacing the School Improvement Monitoring and Brokering Grant (SIMB). Although we did de-delegate in 2022/23, our 2023/24 approach must now absorb the full cessation of the SIMB Grant. Our proposal is set out further in Appendix 4a.
2. **Early Years Block** – We propose to continue our Early Years SEND Inclusion Fund (EYIF), with this fully financed from the Early Years Block. The number of claims from providers for EYIF funding however, has significantly increased during 2022/23, and we see that it is necessary to increase the EYIF planned budget in 2023/24 by £0.150m to absorb this. Our spending on the Disability Access Fund (DAF) continues generally to be lower than the annual value of DAF funding that we receive through the Early Years Block, and we have accrued a sizeable surplus balance as a result (estimated at £0.741m at the end of 2022/23). This is despite us, at April 2021, increasing the value of DAF we allocate per eligible child per year to £1,000, which is higher than the £800 minimum that is currently required by the DfE. The DfE's expectation is that DAF funding is used for the purpose intended (which is to support children in early years with SEND), and there is clear over-lap between DAF and EYIF funding streams. In the context of the DAF surplus balance, and the growth in cost of EYIF, we propose to use the 2023/24 DAF allocation to support our EYIF cost, with the cost of DAF in 2023/24 funded from the surplus balance that will be carried forward; currently estimated at £0.100m. We will keep this position under review for future years. We will also continue to review how we can further support increasing the take up of DAF funding.
3. **Early Years Block** – Prior to April 2021, the cost of the Area SENCOs (who support Private, Voluntary and Independent providers), and a contribution to early years SEND support services (including portage), were charged to the Early Years Block. In seeking to protect the Early Years Block, during the COVID-19 pandemic, we transferred these costs to be met by the High Needs Block, with the intention to transfer the costs back at an appropriate time. Within the 2022/23 budget, we transferred back the cost of the Areas SENCOs, but the contribution to early SEND support services continued to be met by the High Needs Block. In now managing the financial pressure that is increasing within the High Needs Block, in the context of the current more secure position of the Early Years Block, we propose to return this contribution to the Early Years Block in 2023/24. We will keep this position under review for future years.
4. **Early Years Block** – We propose in 2023/24 to increase the Early Years Block's contribution to the cost of the Authority's early years entitlement funding and provider support services. The Authority delivers support services for provider sustainability, quality (including Ofsted support), as well as the delivery of the Early Years Single Funding Formula and related monitoring, compliance and intervention. The Forum agreed a new contribution to these services, of £0.100m in 2022/23, which we stated we wish to further review, as the full cost of these services is higher and as there is growing need to ensure that sufficient capacity is available in response to increasing demands and complexities. We propose to increase this contribution from £0.100m to £0.530m in 2023/24. This is intended to meet the staffing costs of the early years entitlement and quality support teams, inclusive of estimates of pay award / inflation in 2023/24. *

We have previously presented benchmarking information to the Forum, which has evidenced that we are a very low central retainer of funds within the Early Years Block. In 2022/23, Bradford centrally retained a value equivalent to £0.03 per child per hour (3&4 year olds), which is significantly lower than all other median averages (national median of £0.21; Yorkshire & Humber median of £0.20; statistical neighbour median of £0.17, Metropolitan Districts median of £0.19). A number of local authorities also hold additional funds centrally in relation to 2-year-olds, whereas Bradford does not specifically retain anything. This low retention is to the benefit of the funding allocated to providers, but is to the detriment of the Council's budget, as Bradford Council's budget is currently meeting the costs of provider support functions that are charged to the Early Years Block in other authorities. In the context of the Council's budget position, which is very challenging, whilst being very aware of the need to continue to maximise the funding rates for entitlement providers, the Council is seeking to achieve an increased contribution from the Early Years Block to the cost of these provider support services and functions, on an on-going basis, so that these functions can be sustained. On current estimates, where we increase the contribution to £0.530m, our spend per child per hour on these centrally retained funds would be c. £0.10, increased from £0.03. This excludes the contributions to SEND support services, which are explained in paragraph 3 above. When we include these SEND contributions, our total centrally retained spend would be £0.18 per hour.

Details of the Item for Consideration

This type of spend per hour comparison does have difficulties, and is affected by how authorities declare their spending. Another, perhaps more holistic, way of looking at this is with reference to the regulatory restriction within the Early Years Block, which currently requires that a minimum 95% of 3&4-year-old entitlement funding be delegated to providers, via the Early Years Single Funding Formula (EYSFF) and Early Years SEND Inclusion Fund (EYIF), meaning that, regardless of the value or type of spend (or where this is declared in public budget reporting), authorities can only spend a maximum of 5% of such funds otherwise, including on centrally managed services that support the delivery of the entitlements and providers, contributions to early years SEND functions, supporting rates of funding for the 2-year-old entitlement (which, although being delegated to providers is not being spent on the 3&4 year old entitlement), or on transfers to other DSG blocks.

As we reported to the Forum in January 2022, 97.2% of our estimated 2022/23 3&4-year-old entitlement funding (excluding the allocation of brought forward balances) is being passed-through to providers; meaning that we are currently well within the 95% requirement. The national average is 97.5% and the statistical neighbour median is 98.3%. From this, we could conclude that we currently pass through a lower than average %. However, this is not the result of higher central retention. Our 97.2% figure is lower as a result of our 'over-spending' on the 2-year-old entitlement, which we would not expect in the majority of other local authorities. In 2022/23, we are spending c. £0.45m more on delegated 2-year-old entitlement provider funding than the specific DSG funding we receive, meaning that our spending on the 3&4-year-old entitlement is £0.45m less than it otherwise could be. If we adjust for this, so that we try to only look at the impact of centrally retained funds, our 2022/23 % increases from 97.2% to 98.7%, which is above the national average and which accords with our overall understanding of our current lower central retention position. On estimates, our equivalent % in 2023/24, incorporating our indicative Early Years Block and Early Years Single Funding Formula models (which are still to be finalised), including increasing the contribution from £0.100m to £0.530m, excluding the use of brought forward balances, and adjusting for the 2-year-old entitlement overspend, our % would be c. 98.2%, which remains above the 2022/23 national median average.

* The early years entitlement and quality support teams support the delivery of the District's early years entitlements, focusing, in particular, on communication, provider sustainability, quality of provision, compliance and on the processes that are required for the effective and timely delivery of the Early Years Single Funding Formula (EYSFF), in support of parents and providers. This includes:

Sustainability – Working to address issues relating to the sustainability of the PVI early years and childcare sector, including issues that have come from the impact of the COVID-19 pandemic on already present regional and national pressures relating to staff recruitment and retention.

Quality of childcare provision – Supporting the delivery of consistently high quality childcare, which supports the most vulnerable children in the District to receive the best possible early education and to improve their readiness for school.

Early Years Single Funding Formula (EYSFF) – Delivering the EYSFF, including the extended 30 hours entitlement, and developing new technology (such as the Provider Headcount Portal) and other tools to enable providers, as well as parents, to better understand their entitlements to provision and the funding mechanisms.

Funding compliance – Visits to providers, to check compliance in relation to the allocation of entitlement funding and to verify that providers are meeting the terms and conditions of the early years entitlement funding agreements. A rolling programme of funding compliance visits helps ensure consistent quality across the District and means that providers are appropriately challenged, with a reliable evidence base, should they fail to meet the terms and conditions of funding.

Communication - A new communication strategy is being developed across the early years and childcare sector to cover parents, the public, professionals and providers. This strategy, and better communication, focuses on increasing the take up of places, as well as improving the quality of information that is available.

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

Recommendations will have direct implications for the distribution of the Central Schools Services Block, Schools Block and Early Years Block.

Recommendations

- (1) Members are asked to note the information provided in the report.
- (2) Members are asked to consider whether any further information is needed to enable final recommendations and decisions to be taken / made on 11 January 2023 on the funding of centrally managed and de-delegated Early Years, Schools and Central School Services Block items in 2022/23.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Detailed Summary of Schools, Early Years and Central Schools Services Block funds.
Appendix 2 – Analysis of Per Pupil Contributions to Schools Block De-Delegated Funds & Forecasted carry Forward Balances.
Appendix 3 – Description of Statutory Duties permitted by the funded by the transferred ESG Centrally Retained Duties grant.
Appendix 4a & b – Further Information on De-delegation for Schools Improvement (SIMB).

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools),
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1) De-Delegated Funds held within the Schools Block (Maintained Primary & Secondary Schools)

Ref	Fund	Initial New Cash Value Retained from 2022/23 Schools Budget	Local Authority Recommendation for the 2023/24 Financial Year	Recommended INITIAL New Cash Value Retained from 2023/24 Schools Budget	Change in Fund Value in 2023/24 (negative = reduction)	Estimated Fund Specific Balance Carried Forward from 2022/23	Total Funding Available 2023/24 inc. specific carry forward balance
1	School Re-Organisation Costs (actual cost of existing safeguarded salaries)	£14,842	Continue De-Delegation from both primary & secondary phases for existing safeguarded salaries at actual cost.	£14,842	£0	£0	£14,842
2	School Re-Organisation Costs (school deficit provision Primary phase only)	£0	Continue to pause new de-delegation from the primary phase in 2023/24 and review for 2024/25 (use Balance Carried Forward where necessary). No secondary phase De-Delegation.	£0	£0	£99,075	£99,075
3	Exceptional Costs & Schools In Financial Difficulty (Primary phase only)	£61,300	Continue De-Delegation from the primary phase, recovering the same £app as in 2022/23. Continue existing criteria. No secondary phase De-Delegation.	£54,500	−£6,800	£147,065	£201,565
4	Costs of FSM Eligibility Assessment	£47,047	Continue De-Delegation from both the primary and secondary phases on same basis as 2022/23 (same £apFSM contribution).	£37,475	−£9,572	−£5,149	£32,326
5	Fischer Family Trust - School Licences (Primary phase only)	£27,229	Continue De-Delegation from the primary phase, recovering the cash value needed to match actual cost (TBC - currently estimated). No secondary phase De-Delegation. The decision to continue de-delegation in 2023/24 has already been taken by the Schools Forum on 12 October 2022.	£24,238	−£2,990	£1,305	£25,543
6	Trade Union Main Facilities Time	£134,335	Continue De-Delegation from both the primary and secondary phases on same basis as 2022/23 (same £amount per pupil contribution).	£113,813	−£20,522	£260,805	£374,619
7	Trade Union Health & Safety Facilities Time	£20,528	Continue De-Delegation from both the primary and secondary phases on same basis as 2022/23 (same £amount per pupil contribution).	£17,392	−£3,136	£0	£17,392
8	School Improvement (School Improvement Monitoring & Brokering Grant replacement)	£133,000	Continue De-Delegation from both primary and secondary phases on the same basis as 2022/23 (same £amount per pupil contribution). Please see Document PI Appendix 4a for more details.	£112,655	−£20,345	£122,060	£234,715
9	School Maternity / Paternity 'insurance' fund (Primary phase only)	£476,746	Continue De-Delegation from the primary phase at a value forecasted to afford the scheme in 2023/24, minus the deployment of a proportion (£0.10m) of the estimated fund balance carried forward from 2022/23. No secondary phase De-Delegation.	£553,386	£76,640	£213,761	£767,147
10	School Staff Public Duties & Suspensions Fund (Primary Phase only)	£21,844	Continue De-Delegation from the primary phase recovering the same £app as in 2022/23. Continue existing criteria. No secondary phase De-Delegation.	£19,411	−£2,433	−£41,841	−£22,430
Total Schools Block De-Delegated Funds		£936,870		£947,712	£10,842	£797,083	£1,744,795

2) Schools Block Growth Fund & Falling Rolls Fund

Ref	Fund	Initial New Cash Value Retained from 2022/23 Schools Budget	Local Authority Recommendation for the 2023/24 Financial Year	Recommended INITIAL New Cash Value Retained from 2023/24 Schools Budget	Change in Fund Value in 2023/24 (negative = reduction)	Estimated Fund Specific Balance Carried Forward from 2022/23	Total Funding Available 2023/24 inc. specific carry forward balance
11	Growth Fund (net of the reimbursement via recoupment for academies growth fund allocations for the period April - Aug)	£1,051,498	Continue the existing Growth Fund allocation criteria and make budget provision at a value to meet forecasted costs in 2023/24. The fund that is proposed does not take budget for new growth in the primary phase, with carried forward balance available. A value of £0.600m is proposed to be taken for growth allocations to the secondary phase, for expansions at 1 September 2023. A list of known (existing expansion) allocations will be presented for the Schools Forum's approval in the January meeting.	£796,883	£-254,614	£1,296,284	£2,093,167
12	Falling Rolls Fund (Primary Phase Only)	£0	Continue the existing Falling Rolls Fund criteria, but do not take new budget provision from the 2023/24 Schools Block. £0.50m expected balance to be carried forward into 2023/24.	£0	£0	£500,000	£500,000
Total Growth Fund & Falling Rolls Fund		£1,051,498		£796,883	£-254,614	£1,796,284	£2,593,167

3) Central Schools Services Block (Maintained Schools and Academies)

Ref	Fund	Initial New Cash Value Retained from 2022/23 Schools Budget	Local Authority Recommendation for the 2023/24 Financial Year	Recommended INITIAL New Cash Value Retained from 2023/24 Schools Budget	Change in Fund Value in 2023/24 (negative = reduction)	Estimated Fund Specific Balance Carried Forward remaining from 2022/23 (net of 23/24 spend)	Total Funding Available 2023/24 inc. specific carry forward balance
13	Schools Forum Running Costs	£11,000	Continue at the 2022/23 cash value, adjusted for pay / inflation funded from the CSSB headroom.	£11,700	£700	£0	£11,700
14	Pupil Admissions	£931,300	Continue at the 2022/23 cash value, adjusted for pay / inflation funded from the CSSB headroom.	£987,000	£55,700	£0	£987,000
15	DfE Copyright Licences (national framework for all state funded schools)	£367,500	Continue to charge to the Central Schools Services Block at actual cost set by the DfE. This is still TBC. Early Years and High Needs elements are charged to their respective Blocks on a pro-rata basis.	£378,525	£11,025	£0	£378,525
16	Former ESG funded Statutory Duties (the Council's statutory responsibilities relating to all state funded schools and academies). Please see Appendix 3.	£1,559,343	Continue to passport the value of the transferred Grant back to the Authority at the same cash value as 2022/23, funded from the CSSB headroom, and also using a small proportion of the balance brought forward from 2022/23.	£1,559,300	£-43	£0	£1,559,300
17	Education Access Officers (attendance and education welfare)	£472,000	Continue at the 2022/23 cash value, adjusted for pay / inflation funded from the CSSB headroom.	£500,000	£28,000	£0	£500,000
18	Education Services Planning and Consultation	£140,000	Continue at the 2022/23 cash value, adjusted for pay / inflation funded from the CSSB headroom.	£148,000	£8,000	£0	£148,000
19	CSSB 'Resilience' Provision (DSG Management Planning)	£50,000	We do not propose to continue to hold resilience provision in 2023/24.	£0	£-50,000	£257,917	£257,917
Total Central Schools Services Block Funds		£3,531,144		£3,584,525	£53,382	£257,917	£3,842,443

4) Centrally Managed Funds held in the Early Years Block

Ref	Fund	Initial New Cash Value Retained from 2022/23 Schools Budget	Local Authority Recommendation for the 2023/24 Financial Year	Recommended INITIAL New Cash Value Retained from 2023/24 Schools Budget	Change in Fund Value in 2023/24 (negative = reduction)	Estimated Fund Specific Balance Carried Forward from 2022/23	Total Funding Available 2023/24 inc. specific carry forward balance
20	Maintained Nursery Schools access to Schools Block de-delegated funds	£94,648	Continue current arrangements, whereby Nursery Schools access Schools Block de-delegated items.	£118,230	£23,581	£71,709	£189,939
21	DfE Copyright Licences (national framework for all state funded schools) - EYB element	£32,981	Continue to charge the Early Years Block for the Early Years proportion of the actual cost set by the DfE. TBC	£33,970	£989		£33,970
22	EYSFF - Early Years SEND Inclusion Fund 2 Year Olds	£100,000	Continue to allocate Early Years Inclusion monies to eligible 2 year olds as per the agreed mechanism. Cost in 2023/24 is estimated.	£100,000	£0		£100,000
23	EYSFF - Early Years SEND Inclusion Fund 3 & 4 Year Olds	£400,000	Continue to allocate Early Years Inclusion monies to eligible 3 & 4 year olds as per the agreed mechanism. Cost in 2023/24 is estimated.	£550,000	£150,000		£550,000
24	EYSFF - Early Years Pupil Premium	£436,605	To be delegated to providers during the year, with the fund held centrally at the start of the year. The initial fund value is matched to the Early Years Block DSG EYPP grant value.	£422,990	£-13,615		£422,990
25	EYSFF - Disability Access Fund	£248,000	To be delegated to providers during the year. Proposed to continue to enhance the value of DAF at £1,000 per child in 2023/24. We also propose for this to be funded via the ring-fenced DAF balance brought forward from 2022/23, rather than by taking new budget in 2023/24, with the 2023/24 DAF funds used instead to support increased EYIF costs (cross over between EYIF and DAF)	£100,000	£-148,000	£640,715	£740,715
26	Early Years support capacity (provider sustainability, quality, EYSFF delivery and communication, funding compliance)	£100,000	Increase the Early Years Block's contribution to early years provider support functions / services from £0.100m to £0.530m. Please see Document PI for further information.	£530,000	£430,000		£530,000
27	Early Years High Needs Support (Centrally Managed Area SENCOs for PVI providers, EY SEND Support, including Portage)	£204,000	Continue the Area SENCOs budget (£0.216m), with this increased for pay / inflation. Transfer back to the Early Years Block the budget for EY SEND Services (£0.366m), that was charged to the Early Years Block up to 2021/22, but which was exceptionally transferred to the High Needs Block to support the Early Years Block through the impact of the COVID-19 pandemic. Uplifted for pay / inflation.	£582,000	£378,000		£582,000
Total Early Years Block Funds		£1,616,234		£2,437,190	£820,956	£712,424	£3,149,614
Value of EYB Funds counted towards the 5% Central Budget restriction		£531,629		£1,364,200			

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	2022/23 DSG Planned Budget	Total Indicative Proposed Value 2023/24	Early Years Total Value	Primary Total Value	Secondary Total Value	2023/24 Value £PP			2022/23 Value £PP			Difference £pp			
						Maintained Early Years £ Per Pupil	Maintained Primary £ Per Pupil	Maintained Secondary £ Per Pupil	Maintained Early Years £ Per Pupil	Maintained Primary £ Per Pupil	Maintained Secondary £ Per Pupil	Maintained Early Years £ Per Pupil	Maintained Primary £ Per Pupil	Maintained Secondary £ Per Pupil	
Costs of FSM Eligibility Assessment	47,047	37,475		30,687	6,788										
Fischer Family Trust - School Licences	27,229	24,238		24,238			£1.16		£1.16					£0.00	
School Maternity / Paternity 'insurance' fund	550,000	650,000	96,614	553,386		£26.48	£26.48		£20.29	£20.29			£6.19	£6.19	
Trade Union Facilities Time	149,982	129,624	15,811	90,561	23,252	£4.33	£4.33	£4.33	£4.33	£4.33	£4.33		£0.00	£0.00	£0.00
Trade Union Health & Safety Time	22,919	19,808	2,416	13,839	3,553	£0.66	£0.66	£0.66	£0.66	£0.66	£0.66		£0.00	£0.00	£0.00
School Staff Public Duties & Suspensions Fund	25,200	22,800	3,389	19,411		£0.93	£0.93		£0.93	£0.93			£0.00	£0.00	
Exceptional Costs & Schools In Financial Difficulty	61,300	54,500		54,500			£2.61			£2.61				£0.00	
School Re-Organisation Costs (Safeguards)	14,842	14,842		13,818	1,024		£0.66	£0.19		£0.59	£0.14			£0.07	£0.05
School Re-Organisation Costs (Deficits)	0	0		0			£0.00			£0.00				£0.00	
School Improvement (SIMB replacement)	133,000	112,655		89,640	23,016		£4.29	£4.29		£4.29	£4.29			£0.00	£0.00
TOTAL Value Of De-Delegated Funds / £APP	1,031,518	1,065,942	118,230	890,079	57,633	£32.41	£41.13	£9.48	£26.22	£34.86	£9.42		£6.19	£6.27	£0.05

Please note that the initial planned budget cash value of de-delegated funds in 2023/24 is subject to confirmation (taking account of 1 January 2023 academy conversions).

De-Delegated Funds: Estimated 2022/23 Spending Position / End of Financial Year Balance (to be carried forward into 2023/24)

Fund	Brought Forward Balance from 21/22	Estimated 22/23 In Year Under / Over (-) Spend Position	Estimated Carry Forward Balance into 23/24	Comments
Costs of FSM Eligibility Assessment	0	-5,149	-5,149	Assumed estimated overspend due to budget reductions following academy conversions TBC
Fischer Family Trust - School Licences	2,786	-1,481	1,305	Small adjustment for confirmed buy in from academies & academy conversions TBC
School Maternity / Paternity 'insurance' fund	511,398	-225,928	285,470	Planned £0.15m release of balance in 22/23. Proposed to continue release (£0.10m) in 23/24
Trade Union Facilities Time inc. Health and Safety	273,544	-12,738	260,805	Estimated on projected income and re-charges, which are TBC. 5% charge reduction in 21/22
School Staff Public Duties & Suspensions Fund	34,081	-75,921	-41,841	Possible spend in 22/23 still to add TBC. A number of calls on this budget in 22/23.
Exceptional Costs & Schools In Financial Difficulty	183,703	-36,638	147,065	Allocation using criteria to maintained primary schools.
School Re-Organisation Costs (Safeguards & Deficits)	100,000	-925	99,075	Assumed small budget adjust. for conversions. Held for deficit primary sponsored academies.
School Improvement (SIMB Grant replacement)		122,060	122,060	Please see Document PI Appendix 4a. 22-23 spend proposed to be set against SIMB Grant.
Total Balance of De-Delegated Funds	1,105,511	-236,720	868,792	

Schools Block proportion of estimated de-delegated funds balance
 Early Years Block proportion of estimated de-delegated funds balance

797,083
71,709

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Schools Forum Document PI Appendix 3

Responsibilities held by local authorities for all schools and academies are funded from the Central Schools Services Block (CSSB), with the agreement of Schools Forums.

The following is a list of the responsibilities, extracted from the DfE's 2023/24 Schools Block Operational Guidance, which relate to the value retained within our CSSB for the former Education Services Grant (ESG) funded statutory services and responsibilities.

The references are to the provision written into the School and Early Years Finance (England) Regulations 2022.

Statutory and Regulatory Duties

- Director of Children's Services and personal staff for director (Sch 2, 15a)
- Planning for the education service as a whole (Sch 2, 15b)
- Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)
- Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c)
- Formulation and review of local authority schools funding formula (Sch 2, 15d)
- Internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 2, 15e)
- Consultation costs relating to non-staffing issues (Sch 2, 19)
- Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f)
- Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17)
- Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)

Education Welfare

- Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 2, 20)
- School attendance (Sch 2, 16)
- Responsibilities regarding the employment of children (Sch 2, 18)

Asset Management

- Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)
- General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b)

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BRIEFING NOTE

SUBJECT: Document PI Appendix 4a

School Improvement Monitoring and Brokering Grant (SIMB) Spending & De-delegated Fund Arrangements

- 1. The purpose of this report is to inform the Schools Forum of the spending of the School Improvement Monitoring and Brokering Grant (SIMB) for the academic years 2020/21 and 2021/22, and to discuss the de-delegation of funds from maintained primary and secondary schools in 2023/24.**

Background

2. Since 2017, local authorities have received from the DfE a School Improvement Monitoring and Brokering Grant (SIMB), to support their “core” school improvement activities, with the amount received calculated to be proportionate to each authority’s number of maintained schools. The DfE is ceasing this Grant at 31 March 2023, with the value (per maintained school) allocated in 2022/23 already reduced by 50%. In 2021/22, the Authority received £285,854 in SIMB Grant. In 2022/23, the Authority has received £122,194.
3. As a result of underspending, which occurred during the COVID-19 pandemic, a surplus balance of £426,000 in SIMB Grant funds has been carried forward from 2021/22. This surplus balance is available to be used to offset some of the impact of the full cessation of the SIMB Grant, but subject to the DfE’s decision making on whether unspent SIMB Grant monies will now be recovered. The Conditions of Grant state that the Secretary of State reserves the right to clawback unspent SIMB Grant.
4. The DSG Regulations have been adjusted to permit local authorities to fund all improvement activities, including the core improvement activities previously funded by the SIMB Grant, via de-delegation of funds from maintained schools’ budget shares, with the agreement of their Schools Forum or with the agreement of the Secretary of State, in instances where the Schools Forum does not agree. Effectively, authorities are required now to charge maintained schools for their school improvement support, with the DfE’s view being that this approach brings maintained schools in line with the academies sector.
5. With the agreement of the Schools Forum, we initially de-delegated a sum of £133,000 from maintained primary and secondary schools for the 2022/23 financial year, with contributions taken at £4.29 per pupil. Adjusting for the conversion of maintained schools up to September 2022, the final sum de-delegated in 2022/23 is £122,060. Added to the SIMB Grant, a total of £244,254 is available to the Authority in this current financial year. Added to the £426,000 balance brought forward, the total available is £670,254.
6. Within the 2023/24 DSG budget setting cycle, we will need to agree the continuing value of de-delegation for school improvement support, in the context of the full cessation of the SIMB Grant, but also the carry forward of the SIMB Grant balance. On current estimates, inclusive of forecasted academy conversions up to 1 September 2023, retaining a contribution of £4.29 per pupil would produce a budget of £94,500 in 2023/24, with this split roughly £82,300 primary

and £12,200 secondary. On this basis, without use of the balance brought forward, we would need to substantially increase the per pupil contribution that is levied through de-delegation, in order to continue to make available the same cash value of annual budget that has been available prior to April 2023. For reference, on current estimates, a £10.90 per pupil contribution would be required to produce a budget of £240,000 in 2023/24. Whilst it may be anticipated that, as our number of maintained schools reduces following academy conversions, the cost of the Authority's school improvement programme will also reduce, this is not necessarily the case. We are likely always to have a small number of maintained schools that require additional intensive support, irrespective of our total number of maintained schools. Support for new headteachers and governance will also continue. We estimate that we will spend in the region of £206,000 in this current 2022/23 financial year. We then anticipate that the Authority's programme will continue to cost between £200,000 and £250,000 in 2023/24.

7. Comparisons of spending with other local authorities are complicated, including because the position of other authorities depends on their proportions of maintained schools vs. academies, as well as because we do not yet have figures on which to compare how other authorities will react to the full cessation of the SIMB Grant (these figures will be available in autumn 2023). The latest benchmarking indicates that 43% of local authorities de-delegated some value from maintained schools for school improvement in 2022/23, with contributions per pupil in these authorities ranging between £1 and £34 and with a median average of £6 per pupil. The full national mean average is £4 per pupil. So, our current contribution (£4.29 per pupil) is not out of step with these averages. We do expect then that the contributions taken per pupil in other authorities will increase in 2023/24, as authorities respond to the full loss of the SIMB Grant. We will be able to confirm this in autumn 2023.
8. Without the continuation of funds, the Authority will not have the resources on an on-going basis to continue to financially support school improvement in maintained schools. There would be no capacity to fund schools that offer their knowledge and expertise to support other schools. The SIMB Grant provides funds for backfill for schools, to enable staff to be out of schools, but also support that is delivered by Authority Advisers. These Advisers would not have the capacity to deliver improvement support work e.g. working alongside teachers to improve practice. The only mechanism that would be available would be to ask schools to support other schools, for altruistic reasons, which does not have a secure basis and which also may have detrimental impact on the supporting school.
9. In this context, whilst the decision on de-delegation is one for the Schools Forum, was the Forum to not approve the continuation of de-delegation in any form, it is very likely that the Authority would need to consider an approach to the Secretary of State. We anticipate however, that the discussion with the Forum will more focus on funding the right quantity and type of school improvement support, and reviewing the impact and value for money of this support.
10. As we have stated in previous reports to the Forum, most recently on 12 October 2022, a large proportion of the Authority's school improvement programme allocates monies to reimburse schools that provide peer-to-peer school-led support for maintained schools. A good proportion of the programme also provides maintained schools with support for governance. The Authority's academic year SIMB programme has typically estimated the following:
 - a. Induction of new headteachers – 5 days support for each new headteacher of a maintained school, from an experienced and successful headteacher partner. Estimated at 6 schools at £2,500 per school. Total of £15,000 per year.

- b. Support for interim or acting headteachers – 5 days support for each interim or acting headteacher of a maintained school from an experienced and successful headteacher partner. Estimated at 3 schools at £2,500 per school. Total of £7,500 per year.
 - c. Support to bring about rapid improvements in maintained schools causing concern. The model for each school will be bespoke, but typically will include leadership support, teaching support and mentoring and support for governance, delivered by a partner school, and additional monitoring by an Authority advisor and support from other consultants (such as early years), with monitoring through school review days. Allocation is decided against a costed improvement plan, which is submitted to Authority's Schools Causing Concern Group and which is then monitored through the Authority's Scrutiny Group meetings that take place with the school's headteacher and chair of governors. Estimated at 10 schools at c. £15,000 per school. Total of £150,000 per year. This is the largest single area of use of funding.
 - d. Support delivered by Leaders of Governance, supporting schools where governance requires support, challenge and modelling of good practice. Estimated at up to 1 year's support (for 8 meetings) for 10 schools at £2,400 per school. Total of £24,000 per year.
 - e. Additional advice to governing bodies in difficulty. Estimated at £1,000 per school for 10 schools. Total of £10,000 per year.
 - f. Core governance support (proportion of governance officer salary to support the delivery of the School Improvement Support programme). Estimated at £25,000. Total of £25,000 per year.
 - g. Curriculum support for middle leaders in primary schools and for subject heads in secondary schools. Estimated at £25,000 for primary-phase and £25,000 for secondary-phase. Total of £50,000 per year.
11. To its fullest extent, this programme costs annually c. £282,000. However, the programme is based on estimates of delivery, and the actual quantity and cost of support in any single year does vary from this. It has also been the case the Authority's programme has been affected by the COVID-19 pandemic, most significantly in the 2020/21 academic year. However, we estimate that we will spend in the region of £206,000 in this current 2022/23 financial year. We then anticipate that the Authority's programme will continue to cost between £200,000 and £250,000 in 2023/24.
12. Funding allocations are made to maintained schools that are causing concern to the Local Authority, following intelligence from:
- Education Adviser visits to schools
 - Data: including attendance, attainment, safeguarding
 - Governors
 - Headteachers
 - Finance
 - HR
13. At the Authority's monthly Schools Causing Concern meetings, information is shared and decisions made about the need for and the type of support required. These meetings are attended by senior officers from HR, finance, governance, attendance, safeguarding, data, sufficiency and admissions. The Headteacher and Chair of Governors are informed of the concerns (if not raised by them) and, together with the Adviser and / or Governor Support

Officer, a plan is drawn up with costings. This is then submitted, and support is agreed. Monitoring of the plan, and its costs, is carried out through Scrutiny meetings of relevant officers, the Headteacher and Chair of Governors, which take place at least half termly. Monitoring of the impact of the plan is done in schools through reviews by Advisers and relevant officers. Reports are provided to governors and to the school.

14. At all times the Authority is concerned to deliver value for money for the support that is provided. School to school support plans are costed using pay “day rates”, which are the agreed rates for headteachers / NLEs, teachers and middle leaders at SLE and business managers.

SIMB Grant Spending 2020/21 and 2021/22 Academic Years

15. The attached tables (appendix 4b) provide details of the spending of the SIMB Grant in the 2020/21 and 2021/22 academic years. In summary:
- a. £98,095 was spent in the 2020/21 AY. Spending in this year was substantially affected by the COVID-19 pandemic.
 - b. £172,897 was spent in the 2021/22 AY.

Financial Overview

16. As a result of underspending, which occurred during the COVID-19 pandemic, a surplus balance of £426,000 in SIMB Grant funds has been carried forward.
17. On current forecasts, we estimate that the Authority’s school improvement programme will cost in the region of £206,000 in this financial year and between £200,000 and £250,000 in 2023/24. It is likely that there will be 6 additional schools in need of targeted intensive support. Some schools have not been able to halt a decline in outcomes, which started before the pandemic, and some schools continue to experience turbulence in leadership. We also see that it is important to seek to continue to provide governance support, and an induction for new headteachers, as well as a mentor headteacher to support these during their first year of headship in Bradford.
18. We plan to charge the estimated £206,000 spend this year fully to the SIMB Grant monies. This means that our 2022/23 SIMB Grant allocation (of £122,194) will be overspent (by £84,000) with this charged to the £426,000 balance brought forward. We take the view that this approach will help protect our school improvement resources in case of DfE clawback.
19. On this basis, the £122,060 that has been de-delegated from maintained schools in 2022/23 would be fully unspent to be carried forward within Schools Block ring-fenced de-delegated funds balances. In addition, a net £342,000 of SIMB balance would remain to be carried forward. In total therefore, there would be £464,000 of SIMB monies carried forward into 2023/24.

Options and Recommendations

20. There are two main options for the funding of the Authority’s school improvement programme in 2023/24.

- a. **Option A** – not to take any de-delegation contribution from maintained schools, instead using the £464,000 estimated carry forward balance to cover the cost of the 2023/24 programme. Under this option, we would hold (estimated) a remaining £234,000 of balance, which would be carried forward into 2024/25 (assuming a programme cost of £230,000). This means that we could potentially continue to fully cover the programme cost for a further year in 2024/25, or we could partially subsidise the cost for 2 years. This option would rely on no clawback of SIMB Grant by the DfE. Was the DfE to fully clawback, we would not hold sufficient funding to cover the cost of the 2023/24 programme and we would need to set contributions in 2024/25 to respond both to this and then to meet the on-going full cost of the programme.
- b. **Options B** – continue to take the existing per pupil contribution of £4.29 from maintained schools, using smaller proportion of the £464,000 estimated carry forward balance to subsidise the cost of the 2023/24 programme. Under this option, assuming a de-delegated fund value of £94,500 and a programme cost of £230,000, we would hold an estimated £328,500 of balance to carry forward into 2024/25, meaning that we could potentially continue to more substantially subsidise the cost of the programme for 3 more financial years. Was the DfE to fully clawback SIMB Grant funds, we would hold in de-delegated funds sufficient monies (£95,400 contribution in 2023/24 plus the £122,000 carried forward from 2022/23) to cover the cost of the 2023/24 programme and the ‘hit’ to schools in having to increase per pupil contributions in 2024/25 would be significantly lower than under option A.

21. The Authority proposes Option B, as this option is likely to delivery greater security of funding and will substantially protect maintained schools’ budgets from the full cost impact for longer, albeit that Option A would remove the de-delegation charge that would be levied on maintained schools in 2023/24, which is to the immediate benefit of schools’ budgets that are under pressure.

22. The Authority proposes Option B also in seeking to reduce the disproportionate impact over the medium term, as more maintained schools potentially convert to academy status. Where the annual cost of the programme continues largely unchanged (due to the likelihood that we will always have a small number of schools that require additional support, irrespective of our total number of schools), but the number of pupils in maintained schools reduces, higher rates of per pupil contribution will need to be levied in the future. Option B means potentially that more of the existing SIMB surplus balance will be available over the medium term to manage the impact of this.

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Schools Forum Document PI Appendix 4b

School Improvement and Monitoring Grant Academic Years 2020/21 & 2021/22

Academic Year	Activity	Total costs	Impact	Comments
2020/21	'Boy 87' for all Y6	£32,800	The personal gift of a book and support for teachers to use as curriculum focus	As schools were closed or only intermittently open during this academic year, it was decided to pay for this for all schools and all Y6 children
	Printing Curriculum Materials	£10,570		
	50% salary contribution 1 staff member Governor support	£24,000	Focussed support for governance in schools causing concern – rapid improvements	
	Summer term interim Headteacher support <ul style="list-style-type: none"> - Curriculum leadership support - Teaching and learning support 	£15,875	Leadership capacity improved, smooth handover to substantive headteacher	
	Summer term interim leadership support for school causing concern with absent leaders	£14,850	Increased capacity for Headteacher during long-term absences of leaders	
Total 2020/21		£98,095		

Academic Year	Activity	Total costs	Impact	Comments
2021/22	School to school support for leadership capacity for primary school causing concern	£15,500	School was stabilised during high levels of Covid absence Governance strengthened	
	School to school support- primary school causing concern: <ul style="list-style-type: none"> - School business manager - Middle leader development - Curriculum development - Safeguarding improvements - Monitoring meetings 	£28,630 Plus LA additional monitoring costs <ul style="list-style-type: none"> - Teaching and learning reviews - Scrutiny monitoring meetings 	School received good judgement at Ofsted – summer 2022	
	School to school support primary school causing concern: <ul style="list-style-type: none"> - Middle leader development - Curriculum development - Improvements to safeguarding processes - Interim leadership support for senior leaders - Support for teaching and learning - Support for early years provision - Additional governors - Experienced chair - Monitoring 	£33,750 Plus LA additional monitoring costs <ul style="list-style-type: none"> - Teaching and learning reviews - Scrutiny monitoring meetings 	New curriculum embedded and support for staff in implementation achieved Governance improved	

Academic Year	Activity	Total costs	Impact	Comments
2021/22	School to school support school causing concern: <ul style="list-style-type: none"> - Middle leader development - Curriculum development - Safeguarding improvements - Interim leadership support for senior leaders - Allocation of experienced Chair and impact of this? - Monitoring 	£26,440 Plus LA additional monitoring costs <ul style="list-style-type: none"> - Teaching and learning reviews - Scrutiny monitoring meetings 	Improved capacity of leaders Improved teaching and learning Governance strengthened	
	Support for school causing concern <ul style="list-style-type: none"> - SEND review - Additional adviser support 	£2,500	Support for inclusion improved	
	Additional adviser support secondary school	£2,000	Support for leadership	
	Additional adviser support secondary school	£2,000	Support for leadership	
	Ofsted investigation – external commission	£3,800	Successful outcome for governors and the school, no further action	
	Additional HR support	£9,500		
	New heads support	9 schools £2500 = £22,500	New heads feel supported	
	New heads training	£907	Successful induction of new HT with support	
	50% salary contribution 1 staff member Governor support	£24,000	Focussed support for governance in schools causing concern – rapid improvements	
	Curriculum support SLE support	£1,370		
Total 2021/22		£172,897		

