

**Schools Forum**  
**Wednesday, 11 January 2023 at 0800**  
**VENUE: Council Chamber - City Hall, Bradford**

**PLEASE NOTE**

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

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

**1. APOLOGIES FOR ABSENCE**

The Director of Legal and Governance (Monitoring Officer) 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 7 JANUARY 2022 & MATTERS ARISING**

1 - 12

**4. MATTERS RAISED BY SCHOOLS**

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

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

13 - 16

As presented in **Document PJ**, Forum Members are asked to agree newly proposed allocations, from the 2022/23 Schools Block Growth Fund, to maintained secondary schools and secondary academies. Document PJ replaces Document PA, which was presented on 7 December. The three allocations that were estimated in Document PA are now confirmed.

**Recommended –**

- (1) The Schools Forum is asked to agree to allocate a total of £590,715 from the Growth Fund in 2022/23 to maintained secondary schools and secondary academies, as set out in Document PJ.**
- (2) Members are asked to note that an indicative total sum of £1,319,606 of surplus balance of Growth Fund is ring-fenced and is forecasted to be carried forward into 2023/24 within the Schools Block.**

**6. CONSULTATION - EARLY YEARS BLOCK FUNDING ARRANGEMENT 2023/24 (a)**

17 - 66

The Business Advisor (Schools) will present a report, **Document PK**, which presents the Authority's consultation on proposals for Bradford's 2023/24 Early Years Single Funding Formula. This consultation will go live immediately following this meeting and will have a closing date for responses of 6 February 2023.

This consultation follows from discussions in the 7 December Schools Forum meeting about the knock on implications for our decision making timetable of the late publication by the DfE of the 2023/24 Early Years Block settlement and operational guidance. These were published by the DfE on 16 December.

**Recommended –**

**The Forum is asked for its formal feedback on the proposals. Members are asked to provide their feedback under agenda item 12. The outcomes of the consultation will be presented to the Forum on 8 March. However, this will be after Council has taken its final decisions on DSG arrangements for 2023/24 on 23 February.**

**Members are asked to note that the recommended allocation of the 2023/24 Early Years Block, and Early Years Single Funding Formula arrangements, presented to this meeting are put forward on the basis that the Authority's proposals are implemented. Any variance from this in the final arrangements, as agreed by**

**Council, including changes as result of consultation feedback, will be presented to the Forum on 8 March.**

(Andrew Redding – 01274 432678)

**7. UPDATED 2023/24 DSG POSITION (i) 67 - 68**

The Business Advisor (Schools) will present a report, **Document PL**, which updates Forum Members on the position of the Dedicated Schools Grant (DSG) for the 2023/24 financial year. This is a main reference document for this meeting.

**Recommended –**

**The Forum is asked to note the information provided. This will inform decisions and recommendations to be made under agenda item 12.**

**8. UPDATED 2022/23 DSG SPENDING AND BALANCES FORECAST (i) 69 - 72**

The Business Advisor (Schools) will present statements, **Document PM** Appendices 1 and 2, which update Forum Members on the forecasted spending positions of each of the DSG Blocks for 2022/23, on the estimated values of balances to be carried forward into 2023/24, and on the proposed uses of these balances.

These statements replace the initial indicative forecasts that were presented to the Schools Forum on 7 December (in Document PG).

**Recommended –**

**The Forum is asked to note the information provided. This will inform decisions and recommendations to be made under agenda item 12.**

(Andrew Redding – 01274 432678)

**9. CENTRALLY MANAGED AND DE-DELEGATED FUNDS 2023/24 (i) 73 - 80**

The Business Advisor (Schools) will present statements, **Document PN** Appendices 1, 2 and 3, which set out proposed Schools Block, Central Schools Services Block and Early Years Block centrally managed and de-delegated funds for the 2023/24 financial year.

The statements at Appendix 1 and Appendix 2 replace the indicative information that was presented to the Schools Forum on 7 December (in Document PI).

Appendix 3 newly presents the contributions to be made by each maintained primary and secondary school to de-delegated funds held within the Schools Block and how these compare with the contributions made in 2022/23.

**Recommended –**

**The Forum is asked to note the information provided. This will inform decisions and recommendations to be made under agenda item 12.**

(Andrew Redding – 01274 432678)

**10. INDICATIVE BUDGETS, FUNDING RATES & PRO-FORMAS 2023/24 (i)**

81 - 108

The Principal Finance Officers (Schools) and the Business Advisor (Schools) will present a report, **Document PO**, with Appendices 1-6.

Appendices 1a, 1b and 1c show the indicative values of allocations to be delegated to individual primary and secondary maintained schools and academies within the Schools Block.

Appendix 1d provides an analysis of the change in cost of Schools Block formula funding following the use of the data collected in / based on the October 2022 Census. Modelling previously presented to the Forum has been based on October 2021 Census data.

Appendices 2a, 2b and 2c show the proposed indicative rates of funding for early years settings for the 2023/24 financial year. These rates are shown, prior to the completion of the consultation on our Early Years Single Funding Formula (which closes on 6 February).

Appendix 3 provides a more detailed analysis of how the High Needs Block planned budget has been constructed at individual setting level. Please note that Appendix 3 does not show the values of allocations that high needs providers will actually receive in 2023/24 (as these will be based on monthly occupancy during the year).

Appendices 4 and 5 show the draft Primary and Secondary and Early Years pro-formas, which summarise the Authority's proposed formula funding arrangements. Please note that these pro-formas are subject to the final decisions and recommendations to be made by the Schools Forum, under agenda item 12, as well as to the finalisation of our early years funding arrangements, following the closure of the consultation.

Appendix 6 provides more details of the additional place-led allocations to Special Schools, Special School Academies, PRUs and AP Academies, as directed by the DfE's change in DSG Grant Conditions that was announced on 16 December.

**Recommended –**

**The Forum is asked to note the information provided. This will inform decisions and recommendations to be made under agenda item 12.**

(Andrew Redding – 01274 432678)

**11. UPDATED DSG MANAGEMENT PLAN (i)**

109 -  
130

The Business Advisor (Schools) will present a report, **Document PP**, which is an update of the Authority's Management Plan for the Dedicated Schools Grant. This Plan was first presented to the Schools Forum in January 2021.

The Plan explains the general management principles that guide our decision making and then focuses on High Needs Block matters. Alongside this Plan is presented a list of specialist places planned to be commissioned in 2023/24 and a future year forecast of the High Needs Block.

The Education and Skills Funding Agency (ESFA) now expects that every authority will present to their Forums a Management Plan, which explains their DSG's financial position, the risks of overspending and deficit, and the actions that an authority is taking either for deficit avoidance or for deficit recovery, as appropriate. The plan should include benchmarking and demand-led data, to provide context to the financial picture and which enables a focus to be retained on value for money. A plan is specifically required where an authority's DSG account is in deficit. In these circumstances, an authority is required to submit its plan to the ESFA. This is not the case in Bradford, as our DSG account is in surplus.

**Recommended –**

**The Forum is asked to note the information provided. This will inform decisions and recommendations to be made under agenda item 12.**

(Andrew Redding – 01274 432678)

**12. FINAL DECISIONS AND FORMAL RECOMMENDATIONS 2023/24 DSG (a)**

131 -  
148

The Business Advisor (Schools) will present **Document PQ**, which summarises the decisions and recommendations that the Schools Forum is asked to make in supporting the Local Authority to set the allocation of the DSG and formula funding arrangements for the 2023/24 financial year. The Forum is asked to take decisions (as required by the Regulations), and to make its final formal

recommendations, on the Authority's proposals under the following main headings:

- Schools Block Centrally Managed Funds
- Early Years Block Centrally Managed Funds
- The Central Schools Services Block
- The High Needs Block (including high needs formula funding models)
- The Allocation & Retention of forecasted Balances Brought Forward
- Early Years Block Early Years Single Funding Formula and Pro-Forma
- Schools Block Primary & Secondary Formula Funding and Pro-Forma

#### **Recommended -**

- (1) The Forum is asked for its final decisions on identified items as required by the Regulations.**
- (2) The Forum is asked to give its final formal recommendations on the Authority's proposals for the allocation of the 2023/24 DSG, 2023/24 formula funding arrangements, and the treatment of balances forecasted to be carried forward from 2022/23. The Forum's recommendations will be presented to the Council's Executive on 21 February, and then, subject to the Executive's resolution, to full Council on 23 February, as part of the Council's final decision making process.**

(Andrew Redding – 01274 432678)

#### **13. AOB / FUTURE AGENDA ITEMS**

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

#### **14. DATE OF NEXT MEETING**

*A provisional meeting has been planned (subject to this being needed to complete agenda item 12) to take place on Wednesday 18 January.*

The next substantive Forum meeting is planned for Wednesday 8 March 2023 (remote).

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

**(i) Denotes an item for information.**

Signposting of High Needs Information

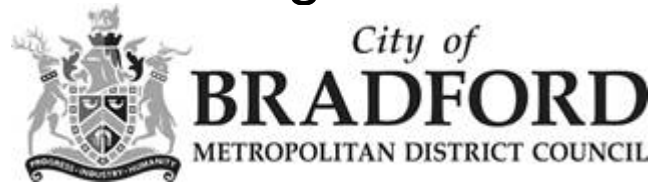
As per the schedule presented on 14 October 2020, “Forum members are expected to access ‘outside of the Forum meetings’ wider SEND information that is presented to other groups and that is already published, including information presented to the SEND Partnership. The Authority will signpost this information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

SEND Partnership Board (minutes of meetings):

<https://localoffer.bradford.gov.uk/coproduction--feedback/send-strategic-partnership-board->

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**Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 11 January 2023**

## Schools Forum meeting held remotely on Wednesday 7 December 2022

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

Commenced 08:15  
Concluded 10:40

### 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                                   |
| Melanie Saville          | Academies Member                                   |
| Helen Williams           | Academies Member                                   |
| Brent Fitzpatrick OBE    | Academies Member                                   |
| Victoria Birch           | Academies Member                                   |
| Richard Bottomley        | Academies Member – Alternative Provision Academies |
| Bev George               | Maintained Nursery Schools – Governor              |
| Sian Hudson              | Maintained Nursery Schools – Headteacher           |
| Emma Hamer               | Maintained Primary Schools – Governor              |
| Kathryn Swales           | Maintained Primary Schools - Headteacher           |
| Jonathan Nixon           | Maintained Primary Schools - Headteacher           |
| Lyndsey Brown            | Maintained Special Schools - Headteacher           |

##### APOLOGIES RECEIVED

| Member           | Membership Group                            |
|------------------|---|
| Michelle Farr    | Academies Member – Special School Academies |
| Nicky Kilvington | Maintained Primary Schools - Headteacher    |

##### NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

| Member            | Membership Group                         |
|-------------------|--|
| Andrew Morley     | Academies Member                         |
| Michael Thorp     | Academies Member                         |
| Kirsty Ratcliffe  | Pupil Referral Unit (maintained)         |
| Graham Swinbourne | Maintained Primary Schools - Headteacher |

## Non-Schools Members

### IN ATTENDANCE

| <b>Member</b>  | <b>Membership Group</b>                  |
|----------------|--|
| Tom Bright     | Teaching Unions                          |
| David Johnston | Officer Representing Vulnerable Children |

### APOLOGIES RECEIVED

| <b>Member</b> | <b>Membership Group</b> |
|---------------|-------------------------|
|               |                         |

### NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

| <b>Member</b> | <b>Membership Group</b>        |
|---------------|--------------------------------|
| Junaid Karim  | Council for Mosques (Bradford) |

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

| <b>Substitute Member</b> | <b>Membership Group</b> |
|--------------------------|-------------------------|
| Alison Kaye              | Academies Member        |

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

| <b>Substitute Member</b> | <b>Membership Group</b> |
|--------------------------|-------------------------|
|                          |                         |

### Local Authority Officers present at the meeting

| <b>Officer</b> | <b>Position</b>                                      |
|----------------|--|
| 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)                  |
| Sue Lowndes    | Assistant Director, Education and Learning (item 13) |
| Andrew Redding | Business Advisor (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 70% of members present (19 out of 27 currently filled membership positions).**

In introducing the meeting, the Chair explained:

- This is the meeting immediately preceding the main annual recommendations and decisions meeting to be held on 11 January. There aren't any 2023/24 related decisions to be taken at this meeting. The only decision item is agenda item 5 - Growth Fund allocations for the 2022/23 financial year.
- The main purposes of this meeting are to:
  - Ensure that members have sufficient information on which to make their recommendations on the allocation of the DSG and formula funding

arrangements for 2023/24 on 11 January. This is the last opportunity that members have to ask for clarification / further information.

- Review the feedback received from the consultations on mainstream and high needs formula funding arrangements.
  - Highlight that the DfE has not yet announced the Early Years Block settlement for 2023/24, meaning that we cannot yet go out to consultation. But we have provided an update under agenda item 6.
  - Consider the DSG's forecasted spending position for 2022/23.
  - Consider further information on high needs, including the SEND Sufficiency Statement.
  - Consider further information on centrally managed funds.
- Members therefore, under each agenda item, should consider whether they feel they have sufficient information and if not, identify areas for clarification.

#### **640. DISCLOSURES OF INTEREST**

The following members declared interests for agenda item 5 (Growth Fund allocations): Ian Morrel, Helen Williams, Ashley Reed and Amanda Slaney.

Emma Hamer, Richard Bottomley and Ian Morrel declared interests for agenda items 9 (High Needs Block consultation) and 12 (SEND Sufficiency Statement).

#### **641. MINUTES OF 12 OCTOBER 2022 & MATTERS ARISING**

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

- Item 634 (Schools Block consultation) – The consultation document was published and the consultation period closed on 29 November. This is picked up under agenda item 7.
- Item 635 (High Needs Block consultation) – The consultation document was published and the consultation period closed on 29 November. This is picked up under agenda item 9. Members requested some modelling of the SEND Funding Floor proposal. This is also presented under agenda item 9 (Appendix 1).
- Item 637 (Central DSG items) – This is picked up again under agenda item 13. We forwarded the Forum's requests for communication and training on Fischer Family Trust to the relevant Bradford Council team.

The Business Advisor then reported the following:

- At the last Forum meeting, there was some discussion about the impact of the current financial climate on the growth of schools in deficit, and there was a request for information on trends. Whilst we can keep the Forum informed, including in our annual report (in May) on maintained school balances, it is not felt to be appropriate to present information at detailed level about individual maintained schools' current financial forecasts, and the Council does not hold any information in respect of academies. We also do not yet have a view about maintained schools' 2023/24 financial year budgets (we do envisage that the 'financial pressure' from inflation and 2022 pay awards will be more fully expressed within these budgets). With these caveats, regarding the current 2022/23 financial year forecasts for maintained schools: we currently have 76 schools. Of these, 2 held revenue deficit balances at March 2022. 3 forecasted to hold revenue deficit balances at March 2023 in their original budget submissions. Based on quarter 2 budget monitoring returns, 5 schools now forecast to hold deficit revenue balances at March 2023 (4 of these are new deficits). Whilst pay award and inflation have had impact, the circumstances in these 4 individual schools is more significant to causing deficit growth during the year. More widely, our 76 schools held a net total of surplus balances of £15.9m at March 2022. Schools currently forecast to hold a net £9.27m at March 2023. A number of schools are indicating a reduction in surplus balances, to a small value (12 with forecasted balances under £20,000) at March 2023. This picture does indicate a substantial forecasted reduction in levels of balances. However, there are 2 points of caution: a) balances held by schools substantially spiked over the COVID-19 pandemic period and b) schools typically (and as a whole) underestimate the values of their balances within their quarterly monitoring returns. In 2021/22 for example, our 76 maintained schools forecasted a net £12.4m of balances at quarter 2 and actually closed with £15.9m.
- 17 November Autumn Statement – The Chancellor's Autumn 2022 Statement did not give much detail about schools and early years funding, but it did state that an additional £2.3bn (£2bn when adjusted for the National Insurance Levy funding) is allocated to the core schools budget in 2023/24 and in 2024/25. By "additional", we mean in addition to the core schools budget figures that were announced in autumn 2021. We take from this:

  - a. That the National Insurance Levy support funding that was included in the Schools Supplementary Grant in 2022/23 will not be clawed back, even though the Levy is no longer in place.
  - b. That the DfE is currently working on a NFF-based approach to the allocation of the additional £2bn. We suspect that this will need to take the form of an additional grant for mainstream primary and secondary schools and academies in 2023/24 (as the NFF settlement and formula funding have already been confirmed).
  - c. It is unclear the extent to which any of the £2bn will be allocated to early years. The DfE however, has now stated that £400m will be allocated in respect of high needs.
  - d. The extent to which this funding will feel like "new money" in schools from April 2023 is still to be determined. We understand that this funding potentially in part will simply replace the current schools' energy protection scheme, which will end 31 March 2022.
  - e. It is still very much the case that the weight of the schools' funding

settlement for the 3-year period 2022 to 2025 is in the 2022/23 financial year i.e. schools (and the High Needs Block) have already received the larger % increases in funding. The % increases in per pupil funding (and HNB funding) in 2023/24, and especially in 2024/25, will be much more modest. We already know this to be the case in 2023/24 from the settlement figures we have received. This is a concern in the context of rising costs, and critical to the financial positions of schools, academies and other providers will be the determination of pay awards and changes in inflation.

- The DfE has this week announced an additional capital allocation for schools and academies in support of improving energy efficiency (£500m nationally). A link to the announcement has been posted onto Bradford Schools Online. It is expected that this capital will be allocated by the DfE in December.

**Resolved – Subject to the correction (to record the attendance of Melanie Saville), that the minutes of the meeting held on 12 October 2022 be signed as a correct record.**

#### **642. MATTERS RAISED BY SCHOOLS**

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

#### **643. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS**

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

These allocations were agreed. Members did not have any comments and did not ask any questions.

**Resolved –**

**(1) The Schools Forum agreed 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 noted 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 noted that it will be asked to consider the allocation and / or retention of this balance at the meeting on 11 January. \***

\* The Forum noted 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.

**ACTION: PRINCIPAL FINANCE OFFICER (SCHOOLS)**

**644. THE EARLY YEARS BLOCK SETTLEMENT & EYSFF CONSULTATION 2023/24**

The Business Advisor (Schools) presented the report, Document PB, which provided an update on Early Years Block formula funding matters. The report included updated benchmarking and the headlines of an indicative scenario for our Early Years Single Funding Formula for 2023/24.

He explained that 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.

The Business Advisor explained that 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.

Members did not have any comments and did not ask any questions.

**Resolved – Members noted the information presented in the report.**

**LEAD: BUSINESS ADVISOR (SCHOOLS)**

**645. CONSULTATION OUTCOMES – SCHOOLS BLOCK FORMULA FUNDING 2023/24**

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

The Principal Officer explained that, 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.

Members did not have any comments and did not ask any questions.

**Resolved – Members noted the information and consultation responses that were presented in Document PC and did not ask for further information to be provided to support final recommendations to be made on 11 January.**

**LEAD:           PRINCIPAL FINANCE OFFICER (SCHOOLS)**

**646.   INDICATIVE BUDGETS 2023/24 PRIMARY & SECONDARY SCHOOLS AND ACADEMIES**

The Principal Finance Officer (Schools) presented the report, Document PD, which provided 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. He explained that this modelling is tabled only for information at this stage, prior to asking members to make their final recommendations. An update of this modelling, based on the October 2022 Census dataset, will be presented to the Forum on 11 January.

Members did not have any comments and did not ask any questions.

**Resolved – Members noted the Primary and Secondary modelling information that was presented in Document PD and did not ask for further information to be provided to support final recommendations to be made on 11 January.**

**LEAD:           PRINCIPAL FINANCE OFFICER (SCHOOLS)**

**647.   CONSULTATION OUTCOMES – HIGH NEEDS BLOCK FORMULA FUNDING 2023/24**

The Principal Finance Officer (Schools) presented the report, Document PE, which asked Forum Members to consider the feedback received to the consultation on the 2023/24 High Needs Funding Model. Modelling of the SEND Funding Floor, as requested by members at the last meeting, was also presented.

The Principal Officer explained that, 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, whilst supportive of the proposals, 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.

The member representing the Teaching Trades Unions asked whether any

responses have been received from schools that would be affected by the proposed amendment to the SEND Funding Floor. The Business Advisor responded that the Authority has not received feedback (either positive or negative) from individually affected schools.

The Chair prompted members to consider whether they now have sufficient information on which to make their recommendations on high needs funding. He asked members to share any feedback that they may have collected as a result of their conversations with school colleagues. The member representing maintained special schools emphasised that not asking questions or making comments at this stage does not at all signal any lack of interest in, or lack of support of, the Authority's proposals. She explained that the District Achievement Partnership is talking very carefully about the financial position. She also emphasised that the special school sector wishes to do all it can to support other sectors that are also facing significant financial pressures, including early years. This message was echoed by the Alternative Provision Academies member. The Chair thanked members for these comments.

**Resolved – Members noted the information and consultation responses that were presented in Document PE and did not ask for further information to be provided to support final recommendations to be made on 11 January.**

**LEAD: PRINCIPAL FINANCE OFFICER (SCHOOLS)**

**648. 2023/24 DSG UPDATE**

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

Within the presentation, he emphasised that, on current early estimates, we may need to use £8.7m of balances within the 2023/24 DSG planned budget, with the majority of this being used in the High Needs Block (£7.6m) and the Early Years Block (£0.95m). The Advisor explained that, whilst based substantially on estimates, we forecast a significant worsening of our High Needs Block's position, to the extent that the risk of us developing a cumulative deficit within the next 3 years (by the close of the 2025/26 financial year) is now high. The receipt of further funding from the DfE (from the additional £400m) may help. However, there are other factors that may offset this gain. This will require closer consideration and discussion, as well as mitigating action to avoid. We will present to the Forum on 11 January the projection of the High Needs Block within our updated DSG Management Plan.

The Chair signalled that he wished to make some comments, following the presentation of the next agenda item (DSG balances). Members did not have any other comments and did not ask any questions.

**Resolved – Members noted the information that was presented in Document PF and did not ask for further information to be provided to support final recommendations to be made on 11 January.**

**LEAD: BUSINESS ADVISOR (SCHOOLS)**



#### **649. 2022/23 DSG SPENDING AND CARRY FORWARD BALANCES FORECAST**

The Business Advisor (Schools) presented the report, Document PG, which updated members on the forecasted spending positions of each of the DSG Blocks against the 2022/23 planned budget. This document gave 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.

In referring to the recent conversations that the Forum has had about the surplus balance that is held within the High Needs Block, the Chair offered his view that, as a result of the Forum's and the Authority's prudent approach to High Needs Block management in recent years, we are in a stronger position to "weather the storm" that now appears to be on the horizon in respect of the High Needs Block. We are in a stronger position to manage the impact of lagged funding, growth in SEND demand, as well as significant uncertainty. An Academies Member supported the Chair's view, adding that the Forum's / Authority's prudent approach to the DSG and to the use of balances has meant that we are better placed to manage peaks and troughs. The Chair explained that the Forum has previously expressed some concern that our surplus balance might be clawed back. However, the DSG is a ring-fenced grant, to be spent on specific school and education activities. The Forum does need to consider how the DSG sits within the wider picture, including alongside the Council's financial position, and the proposals for centrally managed funds within the Early Years Block (under agenda item 13) are put forward in this context.

Members did not have any other comments and did not ask any questions.

**Resolved – Members noted the information that was presented in Document PG and did not ask for further information to be provided to support final recommendations to be made on 11 January.**

**LEAD: BUSINESS ADVISOR (SCHOOLS)**

#### **650. ANNUAL SEND PLACES SUFFICIENCY STATEMENT**

The Strategic Manager, Intelligence and Sufficiency presented the report, Document PH, which is the annual statement to the Schools Forum on the sufficiency of specialist places for SEND. This statement was presented as per the schedule of high needs information, which was agreed with the Schools Forum on 14 October 2020, and in advance on an update of the fuller DSG Management Plan, which will be presented on 11 January.

The Strategic Manager explained that the main message of the statement is the same as the statement presented this time last year: the continued significant growth in the number of EHCPs and the need to create a minimum of 200-240 more specialist places over the 2022/23 and 2023/24 academic years.

The Strategic Manager advised the Forum that the Authority has submitted an application to the DfE for a special school free school. It is anticipated that the

outcome of this application will be known early in the new year. Given the lead in time for a new free school, if successful, the Strategic Manager explained that the Authority is currently working on further interim plans to ensure that sufficient provision is available, both to meet demand and also to reduce our reliance on more expensive independent out of authority placements, which is a cause of significant financial pressure within the High Needs Block. The member representing maintained special schools asked how much we are spending on out of authority and independent placements. The Business Advisor responded that spending is forecasted at £17.75m in this current financial year, which is an increase of £4m (31%) on 2021/22. An Academies Member added that spend not that long ago was reported at £6m, confirming that growth in spending in this area has been significant.

The Strategic Manager explained that the Authority continues to have conversations with many schools and academies about creating new specialist places. She wished to record her thanks to schools and academies for continuing to come forward, especially given how challenging circumstances are at present. The Chair added his thanks, stating that this is a very good example of successful collaborative working. In thanking the Strategic Manager for her report, the Chair also thanked the Strategic Manager for the work of her team and for the clearer strategic plan that has been developed.

**Resolved – Members noted the information that was presented in Document PH and did not ask for further information to be provided to support final recommendations to be made on 11 January.**

**LEAD: BUSINESS ADVISOR (SCHOOLS)**

#### **651. CENTRAL SCHOOLS SERVICES, EARLY YEARS AND SCHOOLS BLOCK FUNDS**

The Business Advisor (Schools) presented the report, Document PI, which asked 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.

The Business Advisor firstly took members through the 3 new recommendations for 2023/24 for the Early Years Block, which includes increasing the Block's contribution to the cost of early years support services from £0.100m to £0.530m.

The Assistant Director, Education and Learning and the Business Advisor then presented Appendix 4, which explained the background and options for de-delegation for the purposes of continuing funds for the Authority's school improvement programme for maintained schools, following the cessation of the School Improvement Monitoring and Brokering Grant. It was explained that the Authority's preferred and proposed approach is option A, as set out in Appendix 4a.

Members did not have other comments and did not ask any questions.

**Resolved – Members noted the information that was presented in Document PG and did not ask for further information to be provided to support final recommendations to be made on 11 January.**

**LEAD: BUSINESS ADVISOR (SCHOOLS)**

**652. SCHOOLS FORUM STANDING ITEMS**

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

**653. AOB / FUTURE AGENDA ITEMS**

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

**654. DATE OF NEXT MEETING**

The next scheduled is Wednesday 11 January. This meeting will be held at 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

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) + 24 pupils at Oct 2022, resulting in an allocation of **£50,811** for the Sept 2022 – March 2023 (total of £87,105 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 2023 (total of £143,159 for the 2022/23 academic year).
- **Immanuel College** (existing expansion) ESTIMATED + 61 pupils at October 2022, resulting in an allocation of **£145,545** for the period September 2022 – March 2023 (total of £249,506 for the 2022/23 academic year).
- **Trinity Academy Bradford** (bulge class intake) ESTIMATED + 13 pupils at October 2022, resulting in an allocation of **£27,523** for the period September 2022 – March 2023 (total of £47,182 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 **£590,715**.

### **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 £590,715 and so the Secondary phase Growth Fund provision is estimated to under spend by £268,485. No further allocations to the secondary phase are expected in 2022/23.

On this basis, in total, the total current estimated value of unspent Growth Fund balance to be carried forward into 2023/24 is £1,319,606. 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 £590,715 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 £1,319,606 of surplus balance of Growth Fund is ring-fenced and is forecasted to be carried forward into 2023/24.**

**List of Supporting Appendices / Papers**

None.

**Contact Officer** (name, telephone number and email address)

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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 Authority's consultation document on proposals for the 2023/24 financial year Early Years Single Funding Formula and information on the Early Years Block settlement.**

**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). An update on this was presented on 7 December (Document PB).

**Background**

We reported in the Forum's autumn term 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, 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. Members should also refer to Document PB, presented on 7 December, which provided an update and which also gave the headlines of the Authority's indicative model for 2023/24, which was based on estimates.

The 2023/24 Early Years Block settlement and operational guidance were published by the DfE on 16 December 2022. The headlines from these publications are presented in the introduction to the attached consultation paper (Appendix 1). Due to the timing of this announcement, the Early Years Working Group (EYWG) has not yet met, but an email, which gave sight of the proposals was sent to EYWG members on 22 December, and a meeting will be called as soon as possible.

We have updated benchmarking of our Early Years Single Funding Formula (EYSFF), now using 2022/23 financial year information. This was presented to the Forum on 7 December. The updated comparisons are also presented within the consultation document at Appendix 1.

It is helpful to quickly remind Forum members of our recent considerations and actions relating to the Early Years Block, and of our existing EYSFF arrangements:

- 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 Regulations place a restriction on the use of supplements in the 3&4-year-old EYSFF; supplements cannot (now in 2023/24) allocate more than 12% of total EYSFF funding (this has been increased from 10% following the merger of teacher grant funding).
- As a consequence of this retention, 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)**

- In 2022/23, we retained £398,000 centrally within the Early Years Block, excluding the contribution to copyright licences. Within this sum, we returned to the Early Years Block the cost of the PVI Area SENCOs budget (£204,000), having transferred this to the High Needs Block on an exceptional basis in 2021/22. We also added a new contribution (£100,000) to support the Authority's capacity to deliver the EYSFF and other early years functions. We passed through to providers 97.5% of 3&4-year-old funding, excluding the use of reserves. The Regulations require a minimum pass-through of 95%. Our benchmarking continues to indicate that we are low central retainer of Early Years Block funds, compared with other authorities. The 97.5% is affected, not just by the values of budgets held centrally within the Early Years Block, but also by the additional cost of the 2-year-old entitlement. We have identified that the cost of funding the 2-year-old entitlement, at our current rates, exceeds its funding, due to the profile of hours that are typically funded across the year by term and 2-year-old access to EYIF. This is a position that we need to continue to monitor closely, to ensure that our 2-year-old funding approach does not place excessive pressure on our 3&4-year-old entitlement funding on an on-going basis.
- 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, 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.

### **Details of the Item for Consideration**

**Please see Appendix 1, which is our consultation document on our Early Years Single Funding Formula (and Technical Statement) proposed for the 2023/24 financial year. This document also summarises the Early Years Block settlement for 2023/24 and changes in the DfE's operational guidance.**

Subject to the Forum's agreement, this consultation will go live immediately following this meeting and will have a closing date for responses of 6 February 2023.

The Forum is asked for its formal feedback on the proposals. Members are asked to provide their feedback under agenda item 12. The outcomes of the consultation will be presented to the Forum on 8 March. However, this will be after Council has taken its final decisions on DSG arrangements for 2023/24 on 23 February. Members therefore, are asked to note that the recommended allocation of the 2023/24 Early Years Block, and Early Years Single Funding Formula arrangements, presented to this meeting are put forward on the basis that the Authority's proposals are implemented. Any variance from this in the final arrangements, as agreed by Council, including changes as result of consultation feedback, will be presented to the Forum on 8 March.

### **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 PL (DSG Summary).

How the Authority is seeking to manage the financial position of the Early Years Block is explained within the introduction to the consultation document at Appendix 1.

On current estimates, we calculate that we will need initially to earmark £0.957m of brought forward balances to ensure that we can meet the cost of our proposed EYSFF arrangements in 2023/24.

**Recommendations**

**Recommended –**

- (1) The Forum is asked for its formal feedback on the proposals. Members are asked to provide their feedback under agenda item 12. The outcomes of the consultation will be presented to the Forum on 8 March. However, this will be after Council has taken its final decisions on DSG arrangements for 2023/24 on 23 February.**
- (2) Members are asked to note that the recommended allocation of the 2023/24 Early Years Block, and Early Years Single Funding Formula arrangements, presented to this meeting are put forward on the basis that the Authority's proposals are implemented. Any variance from this in the final arrangements, as agreed by Council, including changes as result of consultation feedback, will be presented to the Forum on 8 March.**

**List of Supporting Appendices / Papers (where applicable)**

Appendix 1 – Consultation on 2023/24 Early Years Block Funding Arrangements

**Contact Officer (name, telephone number and email address)**

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## Schools Forum Document PK Appendix 1

### Consultation - Bradford District's Early Years Single Funding Formula 2023/24

#### 1) Introduction & Summary

1.1 Attached with this introduction is the Technical Statement, which explains the methodology and timetable that are proposed to be used to calculate funding allocations for individual providers delivering the 2, 3 and 4-year-old entitlements in the Bradford District in the 2023/24 financial year, April 2023 to March 2024. This is known as our 'Early Years Single Funding Formula' (EYSFF). **A summary of our proposals, and a highlight of changes, are given in paragraph 1.10 below.**

1.2 Please note that the values of all funding rates quoted in this document, and highlighted in yellow, are currently indicative and should be viewed as such. It is expected that rates of funding for 2023/24 will be confirmed, following this consultation and the Council's budget meeting on 23 February 2023. The rates presented in this document however, subject to this consultation, do represent what we propose to fund and therefore, do give providers a basis on which to plan.

1.3 Following the changes that were made to entitlement funding arrangements for the 2020/21 financial year, in response to the COVID-19 pandemic, all local authorities for 2021/22 were expected by the DfE to return to their 'normal arrangements' (normal arrangements for counting actual numbers of entitlement hours recorded for children on roll i.e. the normal 'funding follows the child' approach). The DfE continues to expect all local authorities to follow their normal arrangements in 2023/24.

1.4 In reviewing the current and predicted future year overall financial position of our Early Years Block, which is the block of the Dedicated Schools Grant from which local authorities fund providers for the delivery of the early years entitlements as well as other support services relating to early years provision, we do propose in 2023/24 to continue to progress changes that have been put forward in recent years. These changes are aimed at ensuring that our Early Years Block remains financially resilient and that we can sustain and continue to uplift, across the medium term, the Universal Base Rates that providers receive. Our approach continues to be based on our previously established guiding principles, as we still continue to incorporate our responses to the changes that began at April 2017, following the Government's national early years funding reforms. The DfE has made some changes to its operational guidance for 2023/24, which we must also now respond to. The most prominent change is the merger of the Teacher Pay and Pensions Grants, which have previously been allocated to maintained schools and academies, into the Early Years Block. This requires us to consider the adoption of a new Quality Supplement within our Early Years Single Funding Formula (EYSFF), as well as amendments to the funding of maintained nursery schools.

1.5 We have looked closely at how our current 2022/23 financial year EYSFF approach compares with that of other local authorities, and we have reviewed how our provider funding rates compare. A summary of these comparisons is presented in paragraph 3. The headline from these comparisons is that we currently delegate to providers a significantly greater proportion of our Early Years Block than the average authority. As a result of this, facilitated by our use of reserves, providers in Bradford generally currently receive higher values of delegated funding per child per hour for their entitlement delivery than are found in the average authority; through the Universal Base Rates being higher, but also through our spending on our Deprivation and SEND Supplement within our 3&4-year-old EYSFF also being higher.

1.6 As we have explained in our consultations in recent years, whilst awaiting a longer term decision from the DfE on the funding of maintained nursery schools (though protection is now confirmed until the end of the 2024/25 financial year), the most significant change so far for Bradford, resulting from the 2017 national funding reforms, has been the reduction in the value of the funding Bradford receives from Government to

support the delivery of the 3&4-year-old universal and extended entitlements. Since April 2017, in response, the main priority for the Local Authority has been to protect providers as best as possible against the full impact of this reduction. The funding of maintained nursery schools has remained protected because the DfE has provided a specific additional funding Supplement for this purpose. Wider than this:

- We have earmarked reserves (one off monies from brought forward balances) held within our Early Years Block to protect the value of the 3&4-year-old Universal Base Rate at its current year level, which is £4.39 per hour.
- We continue to allocate, in addition to the Universal Base Rate, funding to providers via our Deprivation & SEND Supplement in our 3&4-year-old EYSFF on a proportion of budget that is substantially higher than found in other local authorities, meaning higher provider funding rates. We began at April 2020 to reduce the proportion of our 3&4-year-old EYSFF that is allocated via our Deprivation & SEND Supplement, with the agreed intention at that time to reduce this down to the average of our statistical neighbours, which is rounded at 6%. We set out in our consultation in autumn 2019 our intention to reduce down to the 6% average in three steps over three years, with the proportion reduced from 9.5% to 8.0% in 2020/21, and then down to 7.0% in 2021/22 and then to 6.0% in 2022/23. We actioned the reduction from 9.5% to 8.0% in 2020/21. However, in response to the challenging circumstances created by the COVID-19 pandemic, we did not reduce our spending further in 2021/22, nor in 2022/23. Deprivation and SEND Supplement spending in 2022/23 was retained at 8.0%, which is still around 2% higher than found in the average of our statistical neighbour authorities. Additional reserves are needed to be earmarked to support this higher spending.
- We have also needed to earmark additional reserves held within our Early Years Block to directly pass through to providers, delivering the 2-year-old entitlement, the rate of funding that the Local Authority receives from the DfE for this entitlement, with minimal 'top-slice', whilst also giving access to eligible 2-year-olds to the Early Years SEND Inclusion Fund (EYIF). The current rate of 2-year-old entitlement funding is £5.55 per hour, which is only £0.02 per hour lower than the £5.57 the Authority receives to cover the total cost of the delivery of the 2-year-old entitlement.
- As a consequence of all the above bullet points, as well as the earmarking of reserves, Bradford Council has historically retained centrally within the Early Years Block ('top-slicing' provider funding in order to fund capacity for the Council to deliver additional early years and provider support activities, as well as to administer the EYSFF) a significantly lower value of budget than is retained centrally by the average authority. This has meant that the Council's budget has contributed significantly more to these activities than the budget of the average authority.
- The funding that entitlement providers receive, as well as the funding the Local Authority receives to pass through to providers, is being affected by the reduction in the number of entitlement children in the Bradford District, as a result of demographic changes. As entitlement numbers reduce, the amount of financial flexibility that is contained within the Early Years Block also reduces. It is important that providers are aware of this reduction in flexibility, as this will influence the values of rates of funding that can be afforded going forward, and does influence our proposals for 2023/24.
- 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 to all providers, 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 and, the last time we consulted on this, providers offered mixed views.

1.7 The financial issues for our Early Years Block, that were created by the 2017 national reforms, are still present in 2023/24. In addition, the DfE published a [new consultation](#) in July 2022, which principally focused on the national distribution of Early Years Block funding between local authorities. The DfE explained that the underlying data that forms the basis of the current national distribution of Early Years Block funding between local authorities – the proxy measures of additional need: Free School Meals, English as an Additional Language and Disability Living Allowance - has not been updated for some time and therefore, the distribution of funding does not now accurately reflect the relative distribution of additional needs between authority areas. The DfE proposed to correct this in (and from) 2023/24; to use the latest datasets that are available now and then to update these annually thereafter. However, updating

the data will produce significant swings in funding levels, with some local authorities gaining and some losing substantial amounts of Early Years Block funding, compared with 2022/23. The DfE proposed to manage this by using 'floors and ceilings' in 2023/24, most importantly, a floor of 1% (meaning that no local authority's funding rates, both for the 2-year-old entitlement as well as for the 3&4-year-old entitlement, will increase by lower than 1% in 2023/24. Thereafter, the DfE proposed to introduce an annual protection mechanism, which will prevent large unmanageable reductions in funding rates in any single year. On the DfE's illustrative modelling, published in July 2022, Bradford would be funded on the 1% floor for both the 2-year-old and the 3&4-year-old entitlements. Our warning, published for providers over the summer, was that, where our Early Years Block funding rates only increase by 1%, 1% is likely to be the maximum increase in Universal Base Rates that we can pass through to providers delivering the early years entitlements in 2023/24.

1.8 The DfE confirmed on 16 December 2022 the Early Years Block settlements for local authorities for the 2023/24 financial year, as well as the guidance that local authorities must follow. The DfE also published its [response to the summer consultation](#). The DfE has now confirmed that:

- **All the proposals that were put forward in the summer consultation will be taken forward.** This includes updating the underlying Early Years Block data, within floors and ceilings, and the merging of the school-led Teacher Pay and Pensions Grants into the Early Years Single Funding Formula (EYSFF). This merger requires us to consider the adoption of a new Quality Supplement within our EYSFF, as well as amendments to the funding of maintained nursery schools. The DfE has increased the % of the 3&4-year-old EYSFF that can be allocated using supplements, increased from 10% to 12%, to facilitate local authorities adopting a new Quality Supplement. There are no other major technical changes in how local authorities must use their Early Years Block funding, or must operate their Early Years Single Funding Formulae, in 2023/24.
- **Bradford's rate of funding from the DfE for the 3&4-year-old entitlements is increased from £4.86 to £5.05 per hour in 2023/24.** This represents an increase of + 3.91% (+ £0.19). However, £0.14 of this increase relates purely to the transfer of the school-led Teacher Pay and Pensions Grants into the EYSFF. This is not 'new money' into the District, just simply a technical change in the source of an existing funding stream. **Adjusting for this (excluding the £0.14), our equivalent rate of funding per hour in 2023/24 is £4.91, which represents an increase of 1.03%.** This confirms that we are funded on the DfE's 1% 'floor'. Although our rate of funding would be lower, at £4.87 in 2023/24, without the DfE's floor mechanism, and it can be argued that we have benefited from the lack of data update, because our funding rates since 2018 would have been lower had the underlying data been updated in real time, a 1.03% increase in 2023/24 does represent the lowest increase that is received by local authorities within the national early years settlement. This comes at a time when costs for providers have significantly increased. The 1% settlement immediately restricts the flexibility that we have to increase our provider funding rates in 2023/24 in response.
- **Bradford's rate of funding from the DfE for the 2-year-old entitlement is increased from £5.57 to £5.63 per hour. This represents an increase of + 1.08% (+ £0.06).** As with the 3&4-year-old entitlement funding rate, this confirms that we are funded on the DfE's 1% 'floor' for the 2-year-old entitlement. Again, this comes at a time when costs for providers have significantly increased, and the 1% settlement immediately restricts the flexibility that we have to increase our provider funding rates in 2023/24 in response.
- **Early Years Pupil Premium (EYPP) is increased by the DfE from £0.60 to £0.62 per child per hour.** This represents an increase of 3.33% (+ £0.02).
- The minimum value of Disability Access Funding (DAF) that local authorities must allocate is increased from £800 to £828 per child per year. This represents an increase in the minimum of 3.50% (+ £28). We currently already fund higher than this minimum (at £1,000 per child per year).
- **The Supplement, that is allocated to protect the funding of maintained nursery schools, will be available for the full 2023/24 financial year.** Following the DfE's consultation, we will be funded on a minimum floor Supplement value of £3.80 per hour. Without this floor, we would receive £3.74 per hour in 2023/24. The Supplement has been adjusted to incorporate the transfer of the school-led Teacher Pay and Pensions Grants. Whilst we propose to make some changes to our maintained nursery school funding arrangements, to incorporate this transfer, the uplift of the Supplement funding we will receive

in the Early Years Block does not fundamentally alter our approach to the protection of maintained nursery schools, nor the DfE's expectations for how the Supplement is used. The uplift in the value of the Supplement in 2023/24 will simply mean that we receive a level of funding that more accurately reflects the cost of our existing protection arrangements.

1.9 The DfE's 2023/24 settlement announcement of 16 December does not say anything specifically about the implications for the early years sector of the national SEND Review, and does not propose any changes for 2023/24. Within the document that was published back in March 2022, however, the DfE proposed that the early years sector is brought into the national SEND system. This will potentially alter early years SEND and EHCP systems and support mechanisms, including financial support mechanisms. The DfE has indicated that these changes will likely require a review of the Early Years Block, especially in relation to the Early Years Inclusion Fund (EYIF) and the Disability Access Fund (DAF). At this time, we do not have any details, and we are not clear about timescales for changes, but it is possible that the DfE could alter its guidance for local authorities on how the Early Years Single Funding Formula (EYSFF), EYIF and DAF mechanisms are to operate in 2024/25. If changes are made, we will review our responses with the Early Years Working Group and then consult with providers. We expect the DfE to publish, early in 2023, an improvement plan for the national SEND system, which may provide more information.

#### **1.10 We have developed our proposed EYSFF approach for 2023/24 on the basis that:**

- **We continue to roll out the new Bradford Provider Headcount Portal for the collection of entitlement delivery information from providers.** This Headcount Portal has now already replaced the previous Bradford Provider Gateway that PVI providers, and also that schools and academies that deliver the 2-year-old entitlement, used to submit their entitlement delivery information to the Local Authority. The Authority's plan now is that the Bradford Provider Headcount Portal will be used to collect 3&4-year-old entitlement delivery information also from schools and academies in 2023/24, meaning that the submission of this entitlement delivery information via the Headcount Portal will replace the current approach, whereby this information is extracted from the school's / academy's termly census return that is submitted to the DfE. There are significant advantages to using a discrete mechanism for the collection of entitlement delivery information from all providers. **The Authority will be taking further steps to roll out the Portal to schools and academies for 2023. This will be communicated further.**
- At this time, whilst we move further towards the new Portal, **we do not propose to change how provider entitlement delivery is counted. This means that we propose to continue in 2023/24 to use our existing termly headcount methodology, with a 2nd termly headcount for the 2-year-old entitlement.** The establishment of a single Portal for the collection of entitlement delivery information from all providers will give opportunities for us to explore again the pros and cons of different counting arrangements, including options for counting arrangements that are more sensitive to the movement of children and to the fluctuations in numbers within terms. When we previously consulted with providers, in 2019, on an option to move from a termly-count to a 'starters and leavers' type arrangement, the responses from providers were mixed. We will therefore, wish to consider carefully all options that might be available and to continue to consult with providers on these.
- Regarding the **2-year-old entitlement**, we propose that providers in 2023/24 will continue to be funded on a single flat rate per child per hour with no additional supplements. This rate was £5.55 in 2022/23. The DfE has confirmed that Bradford's rate of funding for 2-year-olds in 2023/24 at Early Years Block level has been uplifted to £5.63 per hour. **We propose to set our rate of funding for providers in 2023/24 at £5.61 per child per hour.** This fully passes the DfE's 2023/24 uplift onto providers, with a continuation of the £0.02 contribution, that was first taken in 2022/23, to the cost of access to eligible 2-year-olds to the Early Years Inclusion Fund (EYIF). This £0.02 contribution provides an estimated total cash contribution of £25,000 to the estimated 2-year-old EYIF budget cost of £100,000.
- Regarding the **3 & 4-year-old entitlement**, we propose:
  - **To set the 3 & 4-Year-Old Universal Base Rate (UBR) for providers in 2023/24 at £4.46 per child per hour.** This is an uplift of £0.07 (+ 1.60%) on the £4.39 that was funded in 2022/23. This uplift fully passes through to providers, via the Universal Base Rate, the DfE's uplift at Early Years Block level (the £0.05 out of the £0.19 uplift, excluding the £0.14 transfer of the school-led Teacher Pay and Pensions Grants), plus a further £0.02 per hour uplift, which is taken from the



element of the grants transfer that relates to the school-led Teacher Pay Grant (not the Teacher Pensions Grant). This is further explained under the Quality Supplement below.

- **To take the previously identified and planned second step, of the three steps in total, to reduce our spending on our Deprivation & SEND Supplement.** The first step was taken in 2020/21, reducing our spending from 9.50% to 8.00%. **The proposed second step in 2023/24 will reduce spending from 8.00% to 7.00%.** The third step will be further reviewed and discussed in our consultation to be published for 2024/25 arrangements. We previously indicated that we are minded to propose a reduction from 7.00% to 6.00%, to bring us in line with the average of our statistical neighbour local authorities. We are very likely to propose this in our 2024/25 EYSFF arrangements. Please see paragraph 3 for benchmarking.

We set out the rationale and impact of this change in our consultation document, that was published in autumn 2019. The 'second step' was proposed at this time, in outline, to be enacted in 2021/22, but was postponed over the COVID-19 pandemic period. We now propose to enact this in 2023/24. In the context of our benchmarking, showing our significantly higher spending level, the primary purpose of the reduction in % spending is to enable us to sustain Universal Base Rate (UBR) funding. If we do not reduce Deprivation & SEND Supplement spending, we will not be able to afford the UBRs (for both the 2-year-old and the 3&4-year-old entitlements) that we propose. Roughly, 1% of spend on the Supplement enables £0.04 in UBR funding per hour. The proposal is now put forward to be progressed at this time also because we already calculate that we will need to earmark a substantial value of Early Years Block reserve, in order to secure the 2023/24 EYSFF.

The proposal to reduce Deprivation & SEND Supplement spending does not affect the funding of maintained nursery schools. These schools will continue to have their 'historic' Deprivation & SEND Supplement rates protected, as expected by the DfE and using the specific Maintained Nursery School Supplement.

As a result of the proposed reduction, from 8.00% to 7.00%, the median average Deprivation and SEND funding rate for nursery classes (in primary schools and academies) in 2023/24 reduces by £0.04 per hour and the median average rate for PVI Providers reduces by £0.03 per hour. Deprivation & SEND Supplement spending in total reduces by an estimated £0.25m (by c. 10.2% on a budget of £2.45m). These reductions are in line with those we published in autumn 2019, and that were agreed following the consultation that was completed at that time.

Individual provider Deprivation & SEND Supplement rates will be updated for the January 2023 Census postcode information. This means that not all providers will see a reduction, or a reduction at the median average, in their funding rate (e.g. where their levels of deprivation have increased), but some providers may see a larger than median average reduction (where their levels of deprivation have reduced). This annual movement in funding rates is a normal aspect of our EYSFF, as we use a 3-year rolling average of the Index of Multiple Deprivation.

- **To introduce a Quality Supplement, for the primary immediate purpose of replicating as closely, but as simply, as possible the Teacher Pension Grant funding stream, that has previously been received by maintained primary schools and primary academies that deliver the 3&4-year-old entitlement, and that has now been transferred into the EYSFF.** As this is a new proposal, this is discussed further in paragraph 2. This is a proposal for 2023/24 only at this time, pending further review for 2024/25.

We do not propose to use the Quality Supplement to replicate the smaller Teacher Pay Grant funding stream (the pensions element is worth 74% of the total of the two grants that have been transferred into the EYSFF – of the £0.14 per hour, the pensions element is worth £0.10 and the pay element is worth £0.04). £0.02 of the Teacher Pay Grant (50%) instead is proposed to be added to the 3 & 4-year-old Universal Base Rate for all providers, forming part of the overall £0.07 proposed uplift, with the remainder of the funding (£0.02; 50%) not specifically allocated but supporting the total cost of the 2023/24 EYSFF.

We propose that the Teacher Pay and Pensions Grant funding that has been transferred into the EYSFF, specifically in respect of maintained nursery schools, is continued to be fully allocated to these schools via an additional fixed lump sum, which will be added to the Maintained Nursery

School Sustainability Lump Sum Factor, rather than via the Quality Supplement. As such, maintained nursery schools will not be eligible for the Quality Supplement in 2023/24, otherwise funding will be duplicated.

- We will pass through to providers the nationally set funding rate for **the Early Years Pupil Premium, which has been uplifted from £0.60 to £0.62 per child per hour for 2023/24.**
- Regarding the **Disability Access Fund (DAF)**, in 2021/22 we increased the value of funding that we allocate per child per year to £1,000, and we retained this value in 2022/23. The DfE has increased for 2023/24 the national minimum funding value, from £800 to £828. **In seeking to support providers with increasing costs, we propose to increase our DAF funding rate, from £1,000 to £1,200 per child per year, in 2023/24.**
- Regarding the **Early Years SEND Inclusion Fund (EYIF)**:
  - EYIF will continue to be fully funded solely from the Early Years Block. In responding to the substantial growth in the number of claims during 2022/23, it is necessary to increase the EYIF budget within the Early Years Block, by £0.15m (increased from £0.50m to £0.65m) to meet continuing higher volume in 2023/24. This is a further financial pressure that needs to be managed within the finite resources of the Early Years Block, which is important for providers to be aware of.
  - We propose to continue to apply the existing Inclusion Fund approach, as set out in Appendix 2, and the existing basic core funding rate per hour of £6.32. This rate is unchanged because the value of Element 2 (£6,000) to which this directly relates is also unchanged in 2023/24.
  - 2-year-olds will continue to be eligible for EYIF.
- Regarding funding the delivery of the **3&4-year-old entitlements in Maintained Nursery Schools**:
  - The protected setting base rate for maintained nursery schools is proposed to be set at £6.08 per hour in 2023/24. This is the 2022/23 protected £5.98 uplifted by 1.60%, in line with the % uplift that is proposed to be applied to the 3&4-year-old Universal Base Rate (UBR) for other providers.
  - The Deprivation and SEND Supplement rates for each maintained nursery school are proposed to be protected at their 2022/23 values, plus 1.60%, again in line with the UBR increase.
  - We propose that the existing elements of the Maintained Nursery School Sustainability Lump Sum Factor are continued to be calculated using the current methodology, with the 'outcomes' of the different factors uplifted by 1.60%, again in line with the UBR. This uplift does not mean that nursery schools will receive in 2023/24 a sustainability lump sum value increased by 1.60% on 2022/23 values. This is because the lump sum works on a sliding-scale basis, with reference to the number of entitlement hours delivered, but also because we will uplift the factors values that are used within the calculation, with 1.60% representing the increase in funding that will be 'normally' allocated through the EYSFF, before a top-up to the minimum is to be provided.
  - We then propose that an additional new fixed value lump sum is added into the Maintained Nursery School Sustainability Lump Sum Factor for each nursery school, to continue to allocate (to protect and to closely, but simply, replicate) their former Teacher Pay and Pensions Grants allocations. It feels appropriate to fund these grants in this fixed way, rather than via the Quality Supplement, because the DfE has specifically added these grants into its Maintained Nursery School Supplement funding, and also because the majority of our nursery schools have been previously funded on a fixed value, due to the DfE's methodology of allocating grant based on a minimum of 100 (FTE) pupils. So, we propose that, in 2023/24, the lump sums for each nursery school be fixed (i.e. will not move for entitlement delivery numbers) based on their total grant funding received in 2022/23, rounded upwards to the nearest £1,000 or a minimum of £20,000, whichever is higher, then uplifted by 1.60%. In 2022/23, 4 schools received allocations of £17,988, 1 received £19,967, 1 received £29,680 and 1 received £36,516. As proposed, in

2023/24, 5 would receive £20,319, 1 would receive £30,479 and 1 would receive £37,590. This approach is also intended to help support schools of a smaller size.

- Regarding sums that are proposed to be **retained centrally within the Early Years Block**, to fund support services that are accessed by providers and services relating to early years provision, on current estimates, we propose to retain a total value of £1.231m in 2023/24. Approval for this value will be sought from the Schools Forum at its meeting to be held on 11 January 2023. This compares with a value of £0.399m that was retained in 2022/23. The increase is mostly explained by two adjustments:

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 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 (£0.366m) to the Early Years Block in 2023/24. We will keep this position under review for future years.

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 Schools Forum agreed a 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 substantially higher and as there is growing need to ensure that sufficient capacity is available in response to increasing demands and complexities. We will ask the Schools Forum at its meeting to be held on 11 January 2023 to increase this contribution from £0.100m to £0.530m in 2023/24. This increase 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 presented benchmarking information, which evidences that we are a very low central retainer of funds within the Early Years Block. This low retention has been / is to the benefit of the funding allocated to providers, but has been / 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 support services and functions can be sustained. On current estimates, where we increase the contribution to £0.530m, our spend per child per hour on centrally retained funds will be c. £0.18 per hour, which is in line with wider averages.

1.11 The deadline for responses to this consultation is **Monday 6 February 2023**. A responses form is included at Appendix 3. However, this year we have introduced a web-based questionnaire, which we encourage you to use to submit your response. Please access the web-based questionnaire [here](#). If you wish to discuss the proposals in more detail, or have any specific questions, please email [schoolfundingteam@bradford.gov.uk](mailto:schoolfundingteam@bradford.gov.uk) or [EarlyEducationFund@bradford.gov.uk](mailto:EarlyEducationFund@bradford.gov.uk).

1.12 It is anticipated that final proposals will be put to Council on 23 February 2023. A confirmed Technical Statement, giving sight of the final Early Years Single Funding Formula, and rates of funding, for the 2023/24 financial year will be published as soon as possible after this.

## **2) The Introduction of a Quality Supplement within the 3&4-Year-Old EYSFF**

### **Background**

The DfE's operational guidance permits local authorities to add 'supplements' into their 3&4-year-old entitlement Early Years Single Funding Formula (EYSFF) arrangements. All authorities must have a deprivation supplement, but authorities can also use, on an optional basis, supplements for: rurality or sparsity, flexibility, quality or English as an additional language. For 2023/24, the DfE has increase the

maximum proportion of the EYSFF that can be allocated via supplements, from 10% to 12%. The DfE's guidance gives authorities a significant amount of flexibility to construct supplements of this type, but expects authorities to adhere to the following principles:

- the use of supplements should be transparent and fair and should be open to all providers which meet the eligibility criteria.
- supplements should be used to channel additional funding to providers and local authorities should not use them to reduce funding rates for providers that do not meet the eligibility criteria.
- local authorities should not distinguish between the universal 15 hours entitlement and the additional 15 hours for working parents; any supplement should apply equally to both entitlements.

In our consultations, in recent years, we have specifically not proposed to introduce any more supplements into our 3 & 4-year-old EYSFF, in recognition that supplements would dilute further both the Universal Base Rate (UBR) and provider Deprivation & SEND rates, at a time when we see our priority to be to maximise the value of the UBR for all providers. This continues to be our overall view of the optional supplements. However, the DfE has made a technical change in the grant funding system for maintained schools and academies for 2023/24, which requires us to consider the adoption of a Quality Supplement. In its guidance, the DfE expressly encourages local authorities to use a Quality Supplement in the management of this change.

### Change

Since September 2019, maintained schools and academies with early years entitlement provisions have received two additional grants from the DfE. Firstly, a Teacher Pay Grant, the purpose of which is to support schools and academies with the additional cost of the September 2019 teacher pay award. This grant is worth £0.282m to our schools and academies in 2022/23. Secondly, a Teacher Pensions Grant, the purpose of which is to support schools and academies meet the cost that came from the significant increase in the employer's contribution to teacher pensions, which increased from 16.4% to 23.6% at September 2019. This grant is worth £0.796m to our schools and academies. In total, these grants are worth £1.078m to our maintained schools and academies in 2022/23, but with the Pensions Grant being the much more significant funding stream.

The DfE has confirmed that these two grants will be transferred into the Early Years Block at April 2023, meaning that schools and academies will no longer receive separate grant allocations and that authorities must adjust their EYSFF if they are to continue to target these grant funding streams as they have been allocated previously. The £1.078m of grant funding has been added into our Early Years Block 3&4-year-old entitlement funding rate, as an additional £0.14 per hour across all hours delivered in nursery classes and in PVI providers, and as an additional £0.49 per hour within the Maintained Nursery School Supplement. If we look at the transfer, in relation only to the funded hours in nursery classes attached to maintained primary schools and academies, we have received an additional £0.29 per hour within our 2023/24 settlement (rather than £0.14 per hour), with £0.22 of this relating to the Pensions Grant and £0.07 relating to the Pay Grant. This is because, roughly, 50% of our 3&4-year-old entitlement hours are delivered in maintained primary school and academy classes.

### Proposals

We propose for 2023/24:

- To introduce a Quality Supplement, for the immediate purpose of replicating as closely, but as simply, as possible the Teacher Pension Grant funding stream, that has been received by maintained primary schools and primary academies that deliver the 3&4-year-old entitlement. This Supplement however, will extend to other providers (PVI providers) that have not previously received the Grant and that could now be eligible where they employ a qualified teacher and pay the employer's national Teacher Pensions contribution, which is currently 23.6% (please see the 3<sup>rd</sup> bullet point below).
- To fund this Supplement as an 'add on' to an eligible provider's total rate of funding per hour for the 3&4-year-old entitlement. We propose to set this rate at £0.23 per hour in 2023/24 (compared with the £0.22 that has been transferred). This means that, where a provider is eligible, their EYSFF funding rate for all the 3&4-year-old entitlement hours that they deliver will be higher by £0.23 than it otherwise would be.

- That providers will be eligible for this Supplement in 2023/24 if they received Teacher Pension Grant funding in 2022/23, or if they evidence to the Authority that they are an employer, that employs a qualified teacher, who directly delivers the 3&4-year-old early years entitlement (the Early Years Foundation Stage), and that pays the national employer's contribution to Teacher Pensions, which is currently 23.6%.
- That this Supplement is in place at this time only for 2023/24, pending review for 2024/25. This is because the primary purpose of the Supplement is to manage the immediate transitional impact of the DfE's transfer of the school-led grants into the Early Years Block. The continuation of the Supplement, as well as the shape of any Supplement, should it continue, will be determined following further review. As such, we warn providers against changing their spending bases purely on the back of the addition of the Supplement into our 2023/24 EYSFF. Also, in particular, we would highlight that the automatic payment of Supplement, to primary schools and academies with nursery classes, purely on the basis of their receipt of the former grants in 2022/23, is regarded as an immediate transitional protection mechanism only, and will certainly be an aspect that will be considered within the review.
- That Maintained Nursery Schools will not be eligible for the Quality Supplement (as the former grant funding is instead allocated via the Maintained Nursery Schools Lump Sum Sustainability Factor).
- Not to use the Quality Supplement to explicitly replicate the smaller Teacher Pay Grant funding stream. £0.02 is proposed to be added to the 3 & 4-year-old Universal Base Rate (UBR) for all providers, forming part of the overall £0.07 proposed uplift.

### Rationale

The considerations that lay behind these proposals are:

- Our use of a Quality Supplement follows the DfE's expectation and strong encouragement; that local authorities should adopt a Supplement to manage the transfer of the grant funding into the EYSFF. The DfE has not provided any specific or detailed guidance on how a Supplement should be constructed.
- Reflecting the very limited time that we have had to respond to this change, and the lateness of the DfE's announcement of EYSFF funding and confirmed operational arrangements for 2023/24, our proposal is deliberately very simple in nature. The simple purpose of our Supplement in 2023/24 is to seek replicate, as closely and as practically possible within the restrictions of a £per hour-based approach to funding, the substantial Teacher Pension Grant funding stream that has been received by maintained primary schools and academies with nursery classes. We stress that the new Quality Supplement is not funded by reducing EYSFF funding that is currently allocated elsewhere. It is funded directly by the transfer of grant into the Early Years Block. We also stress that the Supplement will extend to other providers (PVI providers) that previously have not received the Grant and that could now be eligible where they employ a qualified teacher and pay the employer's national Teacher Pensions contribution, which is currently 23.6%.
- We were not to add a Quality Supplement e.g. were we to distribute the transferred Teacher Pensions Grant funding via our Universal Base Rate to all providers, whilst PVI providers would benefit, the result would be a substantial material loss of funding for maintained schools and academy classes, which would be caused, not by any changes in actual circumstances or changes in costs that need to be supported, but by technical change in the way that grant funding comes into the District. It feels highly appropriate in this circumstance to act to seek to mitigate against the negative consequences of technical system change, especially in the immediate short term, and especially when the cost of teacher pensions is still a significant issue for school budgets. It is also the case that, were we to delay the introduction of a Quality Supplement e.g. to 2024/25, to provide some more time for more holistic considerations, we would have significant difficulties 'reversing' from the 2023/24 position, as we would be required to take funding away from where it was otherwise allocated. Therefore, whilst our proposal for a Quality Supplement, if it is to continue after 2023/24 for the medium to longer terms, will definitely benefit from a review, which takes a more 'holistic' perspective on 'quality', we cannot miss the opportunity to introduce this Supplement now. We will review the position of the Supplement for 2024/25; whether it continues and, if it does, how it works. We are aware, for example, that a Quality Supplement could be used in more ways, and that there are approaches that support 'quality', other

than the employment of a qualified teacher. However, we do come back to a primary concern, which is that an extension in use of supplements will reduce the funding that is available in the future to allocate to all providers via the Universal Base Rate.

- Whilst there is a strong and very clear rationale for continuing to support schools and academies with the substantial additional cost of the employer’s contribution to teacher pensions, which does not sit evenly across all types of providers, we feel that there isn’t the same strength of rationale for using the Quality Supplement to explicitly continue the smaller value Teacher Pay Grant funding. Salaries across all providers, and all types of employees, vary. PVI providers have employees that have higher salaries and schools employ teachers across a range of salaries. In this context, the rationale for attaching to the Quality Supplement the Teacher Pay Grant does not feel to be particularly strong. For this reason, we propose not to bring this funding into our Quality Supplement. We instead propose to add £0.02 to the 3 & 4-year-old Universal Base Rate (UBR) for all providers, forming part of the overall £0.07 proposed uplift. £0.01 then supports the uplift of the Quality Supplement from £0.22 to £0.23. The remainder is not specifically allocated and supports the total cost of the 2023/24 EYSFF as proposed.
- Because the Quality Supplement, as proposed, allocates funding on a fixed amount per hour basis, individual maintained primary schools and academies may see some variance in funding (both up and down), compared against previous Teacher Pension Grant allocations. These variances will be caused by a mixture of factors, including annual changes in entitlement delivery numbers, and the movement from funding purely on January numbers to funding on numbers counted each term. The uplift of the Quality Supplement rate, from £0.22 to £0.23, is aimed at helping to minimise small variances.

### 3) Comparing Bradford’s Early Years Block approach and our Early Years Single Funding Formula

3.1 It is important that we regularly compare our approach to the management of our Early Years Block, and our Early Years Single Funding Formula, with other local authorities. It is also important that we review our proposed direction of travel for 2023/24 in this context. Key areas of comparison are presented below. These comparisons are all based on 2022/23 financial year budget information, which has been collected and published by the DfE.

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

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

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

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

3.4 Additional points of comparison:

- Bradford’s 2-year-old Universal Base Rate in 2022/23 is £5.55, which is 26% higher than our 3&4-year-old Universal Base Rate of £4.39. Excluding London, the national average 2-year-old Universal Base Rate is 27% higher at £5.52 than the average 3&4-year-old Universal Base Rate at £4.35. This position has not changed from the 2021/22 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 in 2022/23 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 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 both for children with EHCPs 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.
- 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 cleanly 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 an 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 a deprivation supplement, in addition to higher Universal Base Rate funding.
- Looking at Early Years Block centrally retained funds, in 2022/23, Bradford centrally retained a value equivalent to £0.03 per child per hour (calculated on all 3&4-year-old entitlement children and hours). This excludes the funds that held centrally at the start of the year and are subsequently allocated to providers - Early Years Inclusion Fund, Early Years Pupil Premium and Disability Access Fund. This value of central retention 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 the 2-year-old entitlement (national median of £0.11 per child per hour), whereas Bradford does not specifically retain anything additional. Therefore, this 2022/23 comparison continues to evidence the extent to which Bradford Council is currently a very low central retainer of Early Years Block funding. This is to the benefit of the rates of funding allocated to providers, but is to the detriment of the Council's budget (where Bradford Council's budget is currently meeting the costs of functions that are charged to the Early Years Block in other authorities).

#### **4) Equalities Impact Assessment 2023/24 Proposals**

3.1 The Public Sector Equality Duty (PSED) of the Equality Act 2010 requires the Local Authority to give due regard to achieving the following objectives in exercising its functions:

- Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010.
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.
- Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

3.2 We assess that our proposals for 2023/24 will have a neutral to positive impact on equalities. This is because the arrangements that the Local Authority proposes in this consultation for the 2023/24 financial year retain a significant amount of continuity on current positive practice.

- We propose to fully pass through to providers delivering the 2, 3&4-year-old entitlements, via the respective Universal Base Rates, the 1% uplift in Early Years Block funding that the Authority has been allocated by the DfE for 2023/24. These uplifts continue to support all providers in their delivery of the entitlements. Maximising the uplifts of the Universal Base Rates annually for all providers supports universal good quality provision for all children.
- We propose, via a Quality Supplement, to replicate the substantial Teacher Pensions Grant monies that have been allocated to maintained primary schools and academies with nursery classes, following the DfE's transfer of this Grant into the Early Years Block. This will help ensure that funding for schools and academies remains stable, in support of quality provision for all children, whilst also enabling other providers, who may already (or may choose) to employ a qualified teacher in their direct delivery of the 3&4-year-old early years entitlement, to access additional funding to support this cost.
- We propose to continue the protection of maintained nursery schools, with this protection being funded using the specific supplement within the Early Years Block. We propose to add to this protection in 2023/24 the former Teacher Pay and Pensions Grant funding streams for maintained nursery schools, via a new fixed lump sum approach within the Maintained Nursery School Lump Sum Sustainability Factor. As the numbers of children with SEND and from more deprived backgrounds is typically higher in the maintained nursery schools sector, this protection continues to support provision for these children.
- The Early Years Pupil Premium (EYPP), as well as the Disability Access Fund (DAF) and Early Years Inclusion Funds (EYIF), will continue to complement the Early Years Single Funding Formula and will provide additional funds to support children with SEND, as these have done in 2022/23. The proposal to increase Disability Access Funding, from £1,000 to £1,200 for eligible children, is put forward with the aim of continuing to support providers in Bradford to meet the needs of eligible children with SEND.
- As discussed on page 5, we do now propose to take the previously identified and planned 'second step' (of three steps in total) to reduce our spending on our Deprivation & SEND Supplement down to the average spending level of our statistical neighbours. The first step was taken in 2020/21, reducing our spending from 9.50% to 8.00%. The proposed second step in 2023/24 will reduce spending from 8.00% to 7.00%. This 'second step' was initially proposed in outline to be enacted in 2021/22, but was postponed over the COVID-19 pandemic period.

Our current spending position is 'out of line', when we look at benchmarking (please see paragraph 3), and we assess that we are not able to sustain this position within the finite resources of the Early Years Block. In this context, the primary purpose of the proposed reduction in % spending is to enable us to sustain Universal Base Rate (UBR) funding for all providers. If we do not reduce Deprivation & SEND Supplement spending, to come more in line with the average of spending in other authorities, we will not be able to afford the UBRs (for both the 2-year-old and the 3&4-year-old entitlements) that we propose in 2023/24. This would impact on the funding that all providers receive, including those in receipt of the Deprivation & SEND Supplement. We have used reserves (one off monies), and made other adjustments (including reducing the value of centrally managed funds held within the Early Years Block) to postpone the second step over the COVID-19 pandemic period. However, we assess that it is



now necessary to act, to take a further incremental step in support of achieving the sustainability of our EYSFF over the medium term. This proposal is also put forward because we already calculate that we will need to earmark a substantial value of Early Years Block reserve, in order to secure the 2023/24 EYSFF as currently proposed following the challenging Early Years Block settlement that we have received from the DfE.

Within our assessment of the impact of this proposed change, we stress that, whilst Deprivation & SEND Supplement funding is proposed to be incrementally reduced, from 8.00% to 7.00%, meaning that rates of funding will reduce by a median average of £0.04 per hour (classes) and £0.03 per hour (PVI providers), DAF and EYPP funding streams are continuing and are being uplifted in 2023/24, and EYIF is continuing unchanged at the 2022/23 rate. We also propose to continue to enable eligible 2 year olds to access the EYIF, which is a non-statutory requirement, but which supports early intervention and provider funding for children with early emerging SEND. We are also increasing the EYIF budget by £0.150m in total in 2023/24, in response to increased demand. Within our assessment, we also identify that the £0.07 increase in the 3&4-year-old Universal Base Rate for all providers, that is proposed, exceeds the median average of losses in Deprivation & SEND rate funding. We also stress that the proposal does not affect the funding of maintained nursery schools. These schools will continue to have their 'historic' Deprivation & SEND Supplement rates protected (and uplifted), as expected by the DfE and using the specific Maintained Nursery School Supplement.



# Bradford District Early Years Single Funding Formula 2023/24

## (DRAFT VERSION FOR CONSULTATION JANUARY 2022)

**PLEASE NOTE THAT THIS IS A PROPOSED VERSION OF THE TECHNICAL STATEMENT THAT HAS BEEN WRITTEN FOR CONSULTATION.**

### INTRODUCTION AND SUMMARY

1) The Early Years Single Funding Formula (EYSFF) for the 3&4-year-olds universal and extended entitlements in 2023/24 is proposed as follows:

$$(a + b + c + d) \times e + f = \text{Total EYSFF Funding 2023/24}$$

a) Universal Base Rate (£ per child per hour)

b) Provider Deprivation & SEND Rate (£ per child per hour)

c) Quality Supplement Rate (Eligible Providers Only) (£ per child per hour)

d) Rate Protection (Maintained Nursery Schools only) (£ per child per hour)

$$(a + b + c + d) = \text{Provider's Total Funding Rate per child per hour}$$

e) No. of Entitlement Hours delivered at the provider (per year)

f) Lump Sum Funding for Sustainability (Maintained Nursery Schools only)

For example, on the simple basis that all children at a provider access 15 hours universal entitlement per week for 38 weeks per year, entitlement funding for providers using the EYSFF in 2023/24, prior to the addition of the Quality Supplement for eligible providers, will look like:

a) Universal Base Rate **£4.46**

b) Provider Deprivation & SEND Rate £0.30 \*\* Example Rate Only

$$\text{The provider's funding rate per child per hour} = (\text{£4.46} + \text{£0.30}) = \text{£4.76}$$

c) No. of Entitlement Hours delivered at the provider (per year) = 39,660 calculated as follows:

|                 | <b>Children</b> | <b>Hours Delivered</b> |
|-----------------|-----------------|------------------------|
| i Summer Term   | 78              | 14,040                 |
| ii Autumn Term  | 62              | 13,020                 |
| iii Spring Term | 70              | 12,600                 |

$$\text{Sub Total EYSFF Funding} = \text{£4.76} \times 39,660 = \text{£188,782}$$

2) The Early Years Single Funding Formula (EYSFF) for the extended 30 hours entitlement for eligible 3&4-Year-Olds operates within the same framework as the universal 15 hours entitlement, as set out in this Technical Statement.

Rates of funding, timetabling and counting arrangements are the same. Specific guidance about the funding of the 30 hours entitlement, where necessary, is incorporated into this Statement.

**3) The 2-year-old entitlement in 2023/24 is proposed to continue to be funded via a simple flat rate per child per hour for all providers. The value of rate for all providers is proposed to be set at **£5.61** per child per hour.**

The timetabling and counting arrangements for the funding of the 2-year-old entitlement are the same as for the 3&4-year-old entitlement. Specific guidance about the funding of the 2-year-old entitlement, where necessary, is incorporated into this Statement. A 2nd headcount per term continues in 2023/24.

**4) The existing termly headcount methodology is proposed to be retained for 2023/24.**

We do not propose to make any changes in the 2023/24 EYSFF to how provider entitlement delivery is calculated, meaning that we continue to use the existing termly-headcount methodology, with a 2<sup>nd</sup> termly headcount for the 2-year-old entitlement. The establishment of a single Portal (as explained in the introduction) for the collection of entitlement delivery information from all providers will give opportunities for us to explore again the pros and cons of different counting arrangements, including options for counting arrangements that are more sensitive to the movement of children and to the fluctuations in numbers within terms and during the year. However, we will wish to consider carefully all options that might be available, in consultation with providers.

**4) We propose to introduce a Quality Supplement within the Early Years Single Funding Formula for the funding of the 3&4-year-old entitlement in 2023/24.**

We propose to fund this Supplement as an 'add on' to an eligible provider's total rate of funding per hour. We propose to set this rate at £0.23 per hour in 2023/24. This means that, where a provider is eligible, their funding rate for all the 3&4-year-old entitlement hours that they deliver will be increased by £0.23.

The simple immediate purpose of this Supplement in 2023/24 is to seek to replicate, as closely as possible within the restrictions of a £per hour-based approach to funding, the Teacher Pension Grant funding stream that has been received by maintained primary schools and academies with nursery classes and that has been transferred by the DfE into the Early Years Block at April 2023. As such, the Supplement is in place in 2023/24 to support providers, who employ teachers in their direct delivery of the 3&4-year-old entitlement, with the cost to them of the employer's contribution to teacher pensions. This Supplement however, will extend to other providers (PVI providers) that have not previously received the Grant and that could now be eligible where they employ a qualified teacher and pay the employer's national Teacher Pensions contribution, which is currently 23.6%.

We propose that providers will be eligible for this Supplement in 2023/24 if they received Teacher Pension Grant funding in 2022/23, or if they evidence to the Authority that they are an employer, that employs a qualified teacher, who directly delivers the 3&4-year-old early years entitlement (the Early Years Foundation Stage), and that pays the national employer's contribution to Teacher Pensions, which is currently 23.6%.

This Supplement is in place at this time only for 2023/24, pending review for 2024/25. This is because the primary purpose of the Supplement is to manage the immediate transitional impact of the DfE's transfer of the school-led grants into the Early Years Block. The continuation of the Supplement, as well as the shape of any Supplement, should it continue, will be determined following further review. As such, we warn providers against changing their spending bases purely on the back of the addition of the Supplement into our 2023/24 EYSFF. Also, in particular, we would highlight that the automatic payment of Supplement, to primary schools and academies with nursery classes, purely on the basis of their receipt of the former grants in 2022/23, is regarded as an immediate transitional protection mechanism only, and will certainly be an aspect that will be considered within the review.

Maintained Nursery Schools will not be eligible for the Quality Supplement in 2023/24 (as the former grant funding is instead allocated via the Maintained Nursery Schools Lump Sum Sustainability Factor).

**5) Funding continues to be allocated to all eligible providers in addition to the basic Early Years Single Funding Formula for three purposes, which are explained further in this Statement:**

- Early Years Pupil Premium (EYPP)
- Disability Access Fund (DAF)
- Early Years SEND Inclusion (EYIF)

**6) The funding levels (referring back to 2016/17 funding levels, prior to the national EYSFF reforms) of Maintained Nursery Schools continue to be protected for the full 2023/24 financial year using the specific additional supplement funding that continues to be allocated by the DfE, and as explained in this Statement.**



## SECTION 1

**a) There is a Universal Base Rate per child per hour for the funding of the 3 and 4-year-old entitlements. In 2023/24 the value of this is proposed at £4.46**

- The Universal Base Rate is expressed as a value of funding per child per hour.
- All providers are funded on this Universal Base Rate. Maintained Nursery Schools then receive an additional amount of lump sum funding from the DfE's specific Maintained Nursery School Supplement, effectively to bring the Base Rate for Maintained Nursery Schools up to a proposed £6.08 per child per hour, which is the value of their Base Rate in 2016/17, prior to the implementation of the DfE's national reform, plus uplifts in 2020/21, 2021/22, 2022/23 and 2023/24, in line with the uplifts in the Universal Base Rate for all providers in these years.
- The same value of Universal Base Rate is used to fund both the universal 15 hours entitlement and the additional extended 15 hours entitlement, up to a maximum of 30 hours per child, for eligible children.
- The Universal Base Rate is fixed and will not change during 2023/24. It is fixed at the point the 1<sup>st</sup> draft of Indicative Budgets is published, which for 2023/24 is in February 2023. Please see the timetable at the back of this Statement.
- For maintained primary schools and academies with nursery classes, funding allocated to support whole school costs, such as business rates, remains fully within the primary-phase core funding formula.

**b) The value of a provider's 'Deprivation & Special Educational Needs (SEND) Rate' for 3 and 4-year olds is based on the measured level of deprivation of children taking the entitlement at that provider**

- All local authorities are required by the Department for Education (DfE) to have a deprivation factor within their EYSFF. This funding is allocated, in addition to the Universal Base Rate, specifically to:
  - Support raising the educational outcomes and life chances of children from more deprived background.
  - Support the reduction of the attainment gap that currently exists between children from more deprived and children from more affluent backgrounds.
  - Support providers for the additional costs associated with the delivery of the entitlement to children from more deprived backgrounds and to children that have additional lower level educational needs.
- As with the Universal Base Rate:
  - A provider's 'Deprivation & SEND Rate' is expressed as a value per child per hour,
  - These rates are fixed at the point the 1<sup>st</sup> draft of Indicative Budgets is published, which for 2023/24 is in February 2023. Rates will not change during 2023/24.
  - All 3 and 4-year-old entitlement hours, including the extended 30 hours, delivered at a provider are funded at the same Deprivation and SEND Rate.
  - The DfE's Maintained Nursery Schools Supplement is allocated to maintain each Maintained Nursery School's individual 'Deprivation and SEND Rate' at the 2016/17 value, but with the value of each school's protected rate in 2023/24 uplifted on 2022/23 in line with the uplift in the Universal Base Rate.
- Unlike the Universal Base Rate, which is the same value for all providers, Deprivation and SEND rates vary between providers according to the measured level of deprivation of children attending each provider. Each provider's Deprivation and SEND Rate is calculated using the Index of Multiple Deprivation and the postcodes of children taking up the entitlement at the provider, recorded in the January 2023, January 2022 and January 2021 censuses (this is a 3 year rolling average). Because of the time lag in data, the Local Authority appreciates that using this approach may produce some anomalous funding results, especially for smaller providers. We keep this approach under review.

- Rates of funding have been calculated, based on the estimates of funded hours delivered used to calculate the Indicative Budgets and using the Index of Multiple Deprivation (IMD) scores linked to individual children's postcodes. Where this data for an individual provider cannot be properly determined, or is not available, and for providers that newly establish during the year, the provider's deprivation rate will be calculated using the average IMD scores for all providers of their type. This use of averages is especially applicable to the rates applied to Childminders.

**c) Eligible providers will receive additional funding per child per hour via a Quality Supplement**

- The Quality Supplement is proposed to be expressed as a single fixed additional value of funding per child per hour for all eligible providers, which is allocated in addition to the Universal Base Rate and the provider's calculated Deprivation and SEND Supplement Rate. In 2023/24, the single fixed value is proposed to be **£0.23**.
- We propose that providers will be eligible for this Supplement in 2023/24 if they received Teacher Pension Grant funding in 2022/23, or if they evidence to the Authority that they are an employer, that employs a qualified teacher, who directly delivers the 3&4-year-old early years entitlement (the Early Years Foundation Stage), and that pays the national employer's contribution to Teacher Pensions, which is currently 23.6%.
- Where eligible, all 3 and 4-year-old entitlement hours, including the extended 30 hours, delivered at a provider will be funded at a rate including the additional **£0.23**.
- For providers that are eligible, because they received Teacher Pension Grant funding in 2022/23, the additional rate will be included in their total setting rate for the full 2023/24 financial year. This is because the Authority already has this information. Other providers (Private Voluntary and Independent Providers), that did not receive Teacher Pension Grant funding in 2022/23, but that now assess that they may meet the eligibility requirements, or that may newly meet the eligibility requirements during the year, should apply to the Local Authority using the [EarlyEducationFund@bradford.gov.uk](mailto:EarlyEducationFund@bradford.gov.uk) email address. In such circumstances, following confirmation of a successful application, the additional rate of funding will be applied either from the 1 April 2023, or from the date from which the provider became eligible (e.g. began to employ a qualified teacher and incur pensions costs), whichever is later. Should circumstances subsequently change in these providers, meaning that the provider is longer eligible for the Quality Supplement, the Authority will seek to remove the additional rate funding from the date the provider's eligibility ceased.
- Maintained Nursery Schools are not eligible for the Quality Supplement in 2023/24 (as the former grant funding is instead allocated via the Maintained Nursery Schools Lump Sum Sustainability Factor).

**d) Each provider is funded on the number of 3 and 4-year-old entitlement hours recorded as delivered in a single common census taken each term, with the dates of these termly censuses being the same for all providers**

- Each provider's no. of funded entitlement hours delivered for the 2023/24 financial year is the sum of:
  - Summer term (term beginning 1 April 2023): the total of entitlement hours delivered per week recorded in the census taken on 18 May 2023, x 12 weeks
  - Autumn term (term beginning 1 September 2023): the total of entitlement hours delivered per week recorded in the census taken on 5 October 2023, x 14 weeks.
  - Spring term (term beginning 1 January 2024): the total of entitlement hours delivered per week recorded in the census taken on 18 January 2024, x 12 weeks.
- 'Hours delivered' are the entitlement hours a child is registered to take at that provider, taken from the contracts signed with parents for that term. 'Hours delivered' is not affected by the actual



attendance of children at the time the censuses are taken nor by a child's attendance for the rest of the term after the census is taken.

- The dates for the censuses are the same for all schools, classes and PVI providers. This is so that the entitlement delivery information for each provider can be cross checked to identify any duplicate children.
- PVI providers will continue to be required, as is the process now, to submit their entitlement delivery information directly to the Local Authority via the Bradford Provider Headcount Portal. For maintained schools and academies, funded hours information has previously been extracted by the Local Authority from the data recorded in the "funded hours" field in the DfE Termly Censuses, which schools submit to the DfE via the COLLECT website. However, the Authority plans, from April 2023, that the Bradford Provider Headcount Portal will be used to collect 3&4-year-old entitlement delivery information from schools and academies, meaning that the submission of entitlement delivery information via the Headcount Portal will replace the previous approach. The Local Authority will communicate further with schools and academies on this change. In the event of any difficulty with the initial transition to the Portal, either collectively or in the case of individual schools or academies, the Authority will revert, as is necessary and where appropriate, to using the data from the DfE Termly Censuses.
- Adjustments will be made to the funding of providers that open or close (or cease to deliver entitlement hours) mid-term, to reflect the proportion of the term applicable. Adjustments to funding will not normally be made where closure is only short term and for a public health reason, or for another circumstance that is not within the control of the provider e.g. local or national elections or damage to premises.
- Other than in the two circumstances below, no adjustments will normally be made to funded hours for starters or leavers after the census date in each term. Exceptional circumstances will be considered (via provider application), where a provider admits a significant number of children after the census has been taken in that term (please see section h).
  - Adjustments may be made to funded hours for the intake of children after the census is taken for that term where this is the result of re-allocation from the closure of an inadequate setting.
  - Adjustments to funded hours may be made specifically for the autumn term, recognising that in this term the intake of children into nursery provision is often staggered into schools and classes and that eligible children may start the term at a PVI provider and then move to a school or class before the October census. Where a child started the autumn term at a PVI provider and has moved to a school or class prior to the October census, an adjustment may be made to split the funding for the autumn term based on the number of weeks that a child has attended each provider. This adjustment applies for the autumn term only.
- For the purposes of calculating Indicative Budgets for maintained schools and academies, published before the start of the financial year, the Authority will use estimates of the funded hours that will be recorded in each of the termly censuses.
- The Authority reserves the right to make adjustments to estimates (and to initial payments), or not to make any payment, where the information submitted by providers is demonstrably incorrect or is missing. As provided for within the Funding Agreement, the Authority also will charge an administration fee where there are issues with the quality or the timeliness of funded hours information that is submitted by providers.

#### **e) Only children eligible for the 3 and 4-year-old entitlements will be funded**

- The EYSFF for 3 and 4-year-olds will allocate funding for children in providers that are accessing the entitlement only from the term after their 3<sup>rd</sup> birthday. The 1 September, 1 January and 1 April are taken as start dates for each of the terms. The entitlement is extended to eligible 2- year-olds,

but this does not mean all children accessing provision that are aged under 3 are eligible for EYSFF funding.

- The maximum number of hours any child will be funded for, for the period 1 April 2023 to 31 March 2024, for the universal entitlement is 15 hours per week (for 38 weeks) or the annual equivalent of this total. This is the same for any child regardless of their age, so a four or five-year-old child staying in nursery (rather than moving into Reception at statutory school age) will only be funded for the maximum on this basis, unless they are eligible for the extended 30 hours or they continue to be placed at the request of the Authority, most commonly in the case of children with SEND placed in early years resourced provisions attached to maintained nursery schools, where children can access 25 hours per week.
- Some children will be entitled to 30 hours per week (for 38 weeks per year) and, for these children, 30 hours x 38 weeks is the maximum number of hours that will be funded by the EYSFF between 1 April 2023 and 31 March 2024.
- Although a child can take up their entitlement over two providers, the maximum universal entitlement is still the equivalent of 15 hours per week over 38 weeks per year, unless otherwise agreed. Where a child attends two providers, the Authority will fund each provider on a pro-rata basis only up to a maximum of 15 hours. Where a child attends two providers, the individual providers should ensure they are aware of the entitlement hours being accessed by that child at another provider; this should help to avoid funding discrepancies regarding duplicate pupils. This may involve discussion with the providers involved, in cases where the pro-rata split is not clear from the census returns.
- Although a child can stretch their entitlement over more than 38 weeks, the Authority will fund providers on the basis that all children are taking their entitlement over 38 weeks. It is for the individual provider to then manage funding. To ensure providers are funded correctly, these children should still be recorded in the censuses as accessing 15 hours or 30 hours, where they access an annual total of 570 hours (equivalent to 15 hours x 38 weeks) or 1,140 hours (equivalent to 30 hours x 38 weeks).
- The ESYFF does not apply a cap on the number of hours funded based on the published admission number of a maintained school or academy provider. However, schools and academies are expected to remain within their agreed Published Admission Number (PAN).
- More detailed guidance on the eligibility requirements for the extended 30 hours entitlement, the processes for determining this and how the Authority is required to verify eligibility, can be found on Bradford Schools Online [here](#). All providers are reminded that they must check 30 hour codes prior to confirming with parents their child's eligibility for the extended entitlement, and also prior to the submission of their censuses. The Local Authority conducts a code-checking exercise each term, through which the Authority confirms the children that are eligible to be funded for the extended entitlement. The Authority will not fund a provider for the extended entitlement, where 30 hour codes are not valid or where these have not been issued before the deadline date for eligibility in the current term.

**f) The Confirmed Indicative Budget, published in March 2023, for maintained nursery schools and for maintained school and academy nursery classes only gives an estimate of funding. A pre-calculated Indicative Budget for PVI providers has been replaced by a flexible Ready Reckoner**

- A pre-calculated 1<sup>st</sup> draft Indicative Budget for 2023/24 will be published at the end of February 2023 only for maintained school and academy providers. This will show the Universal Base Rate and the provider's Deprivation and SEND Funding Rate, which are fixed for 2023/24. For the purposes of calculating these Indicative Budgets, simple estimates of the funded hours for the following year will be used. The pre-calculated Indicative Budget will be based on hours delivered by each school and academy in the previous year i.e. these budgets estimate that a school's / academy's delivery numbers in the new year will be the same as in the previous year.

- Maintained school providers and academies will have the opportunity to revise their estimates, should they wish, to incorporate their latest information on admissions for the coming year. A Confirmed Indicative Budget for 2023/24 will then be published in mid-March 2023. This budget will then be used to begin payments to maintained schools and academies within the Authority's established whole-school monthly advances system. A ready reckoner for maintained school and academy providers to use to estimate any funding adjustments will be published alongside the Confirmed Indicative Budgets.
- Following feedback from PVI providers, pre-calculated Indicative Budgets are no longer published for PVI providers. Instead, an electronic (Excel) Ready Reckoner will be published in February 2023, showing the per hour rates of funding for each provider. This Ready Reckoner then allows providers to calculate their own indicative budgets, based on their own estimates of hours that they expect to deliver across the coming year.

**g) A provider's actual funding will be adjusted to reflect differences between estimated and actual entitlement hours delivered during the financial year**

- Adjustments to funding will be calculated following each of the termly censuses:
  - Please see the timetable at the end of this statement for when adjustments will be published and actioned in 2023/24. These adjustments will alter the amounts of funding physically paid to providers.
  - The adjustments will reflect the differences between estimated and actual funded hours delivered.
  - A ready reckoner is provided by the Authority, which providers should use to anticipate these funding adjustments and plan their provision and spending accordingly.
  - A statement of the value of adjustments is published in advance of these being actioned through the payments system. Please see the timetable.
- Additional notes on the calculation of funding adjustments:
  - The values of adjustments are influenced by the accuracy of the estimates of funded hours that are used. Adjustments are likely to be larger in value for providers that have more volatile numbers. Providers should use the ready reckoner to anticipate these.
  - Adjustments can be both positive and negative.
  - Adjustments will take account of any sustainability funding for maintained nursery schools that is funded via the DfE's supplement. The ready reckoner provided by the Authority for nursery schools incorporates this.
  - All adjustments for the 2023/24 financial year will be calculated and actioned before 31 March 2024. However, because of the very tight timescale for processing the data after the January 2024 census, the adjustments for the spring term 2024 will be based on summary information. Where amendments to funding are subsequently identified e.g. for duplicate children, following the processing of the more accurate individual child level census data, these amendments will be incorporated into the adjustments made to the funding for the summer term 2024. Where a provider does not pay back, via separate cheque or by BACs, any monies owed to the Authority at year-end, the value of funding owed will be taken from the provider's summer term payment.
  - Where closed or closing providers owe funding to the Authority, where the value owed cannot be recovered through adjustment of future payments, the provider will be asked to pay the funding back via cheque or via BACs.
- The first payment of the financial year, in April 2023, and then the first payments in each subsequent term, for schools and classes will be based on the Confirmed Indicative Budget.
- For PVI providers, these first payments will be based either on latest actual delivery information or on updated estimates that have been submitted by providers through the Bradford Provider Headcount Portal.

## **h) In 2023/24 EYSFF funding will continue to be paid monthly to all providers**

- For maintained schools and academies, the Authority operates a well-established whole-school monthly advances payment system. EYSFF funding will continue to be paid using this. The adjustments to EYSFF funding will be incorporated into the September 2023, December 2023 and March 2024 advances adjustments. Please see the timetable.
- The Authority has now long established monthly payments to PVI providers. 2023/24 arrangements continue as follows:
  - Summer Term 2023:
    - Funding calculated on the latest delivery information / latest estimates will be divided by 5 (no. of months in the term) for 5 equal payments to be made between April and July.
    - 2 payments will be made in April, firstly for April and then for May. Payments for the remaining 3 months of summer term will be paid in May, June and July respectively.
    - Any positive or negative adjustments following the re-calculation of funding using the May Census actual numbers will be added to or deducted from the July payment.
    - Where the July payment is insufficient to recoup the full value of any negative adjustment, the August payment will also be reduced. Where a negative balance is still outstanding after this, a deduction will be made from September payment (and so on).
  - Autumn Term 2023:
    - Funding calculated on the latest delivery information / latest estimates will be divided by 4 (no. of months in the term) for 4 equal payments to be made each month between August and November.
    - The payment for September will be made in August, with payments for the remaining 3 months of the term made in September, October and November.
    - Any positive or negative adjustments following the re-calculation of funding using the October Census actual numbers will be added to or deducted from the November payment.
    - Where the November payment is insufficient to recoup the full value of any negative adjustment, the December payment will also be reduced. Where a negative balance is still outstanding after this, a deduction will be made from the January payment (and so on).
  - Spring Term 2024:
    - Funding calculated on the latest delivery information / latest estimates will be divided by 4 (no. of months in the term) for 4 equal payments to be made each month between December and March.
    - The payment for January will be made in December, with payments for the remaining 3 months of the term made in January, February and March.
    - Any positive or negative adjustments following the re-calculation of funding using the January Census actual numbers will be added to or deducted from the March payment.
    - A provider that has still been overpaid after the March payment must repay the value of overpayment by cheque or by BACs by 30 April 2024. Where a cheque or BACs payment is not received by 30 April 2024, the Authority will deduct the value of the outstanding overpayment from the next available monthly payment in the summer term. This is likely to be in May 2024.
- The Authority will continue to talk to individual PVI providers about how information submitted through the Bradford Provider Headcount Portal can feed into the monthly payments system (so that payments that are made prior to the collection of the censuses can be based on a provider's latest delivery information / latest estimates). Adjustments to payments can be made during the term and prior to the final adjustments being enacted.
- Where a PVI provider experiences exceptional cash flow difficulties, they should contact the Authority to discuss this further. Contact details can be found in Section 3 of this document.

- Providers will receive one single payment each month, which combines EYSFF funding and other grant allocations (such as EYPP, DAF, EYIF and EHCP funding) applicable for that month. A breakdown of the values paid for each type of funding and / or grant allocation will be shown on the advances (payments) update schedules. These schedules will continue to be updated and published on Bradford Schools Online monthly. We strongly recommend providers download and check these schedules each month.
- Monthly payments pull together the main recurrent funding streams, which are the 2-Year-Old entitlement, the 3 & 4-Year-Old entitlement, Early Years Pupil Premium, DAF, EYIF and SEND top up funding for children with EHCPs. Early Years Pupil Premium payments are made on a termly retrospective actuals basis and are added to monthly payments as a lump sum in September, December and March. All other non-entitlement payments (EYIF, DAF, EHCP top up) are made on an actuals basis in the next available monthly payment following their confirmation.

#### **i) Approach to Funding Sustainability & Exceptional Entitlement Funding in 2023/24**

- The EYSFF in 2023/24 continues to include a “sustainability” lump sum factor, which works on a sliding scale basis to allocate funding specifically to Maintained Nursery Schools in addition to the funding per children per hour. This factor ensures that funding allocations continue to reflect specific:
  - Site related costs: buildings and grounds maintenance costs, business rates and insurance,
  - Fixed type costs incurred by maintained providers in leadership and management and administration and premises staffing.
  - New for 2023/24: the continuation of the Teacher Pay and Pensions Grant funding streams.
- Maintained school, academy and PVI providers can access advice on sufficiency and sustainability provided by the Authority’s Sufficiency Officers.
- The Schools Forum has established a process, which is used to consider the allocation of additional funding, on a one off exceptional basis, to maintained primary schools that request financial support in response to exceptional cost pressures. Requests for funding are reviewed on an individual case basis against set criteria. Such requests are rare, but the most likely cause of a request is a significant increase in pupil numbers during the financial year, where the maintained school has had to make additional provision, such as establish a new class, but where this school’s funding has not responded to this increase in pupil numbers due to the ‘lag’ in the funding system.

This established process will continue to be used in 2023/24 to consider any requests for additional exceptional EYSFF entitlement funding that may be made by any maintained school, academy or PVI provider. The Authority expects to consider submissions of this nature only where a provider evidences that they have admitted a significant number of entitlement children after the census for that term has been collected, and so evidences that the census does not accurately reflect their true significantly higher net entitlement delivery in that term.

In such cases, exceptional circumstances will be measured in terms of the level of additional cost pressure faced by the provider in admitting these additional children, rather than simply in terms of measuring this on the number of additional children not counted in that term’s census. The Authority will also look at the provider’s actual delivery weekly across the term. The Authority would not expect providers to seek to claim additional entitlement funding only for small variances in numbers and, for example, where numbers following the term’s census may have increased but where this is balanced by numbers being much lower in the weeks prior to the census. We would remind providers that a single termly count is designed to protect funding against smaller fluctuations in numbers during each term. We would also remind providers of the standard adjustments that are made within our normal arrangements (in the autumn term and following the closure of inadequate settings) as explained in section c.

## **j) The Early Years Pupil Premium (EYPP) in 2023/24**

- Providers will receive up to £353 per year, or £0.62 per child per hour, for each eligible child. The maximum number of annual hours funded for eligible children is 570 (15 hours x 38 weeks). Where a child is also eligible for the additional 15 hours entitlement for working parents, EYPP is paid on the universal 15 hours only, up to a total of 570 hours in the year.

- The DfE's guidance on the EYPP is available here:

<https://www.gov.uk/government/publications/early-years-funding-2023-to-2024/early-years-entitlements-local-authority-funding-operational-guide-2023-to-2024#early-years-pupil-premium-eypp>

<https://www.gov.uk/get-extra-early-years-funding> (DfE still to update this for 2023/24)

<https://www.gov.uk/government/publications/experiences-of-the-early-years-pupil-premium>

- Providers should also refer to the specific guidance on EYPP that is available on Bradford Schools Online here:

<https://bso.bradford.gov.uk/Secure/CMSPage.aspx?mid=3346>

- As with the school-age Pupil Premium Grant, the Government expects that providers are best placed to take decisions on how to support their disadvantaged pupils. Restrictions therefore, are not imposed on how providers spend the Early Years Pupil Premium. Ofsted, through the regular inspection process however, will hold providers to account on how they have used their Early Years Pupil Premium to support their disadvantaged children.
- EYPP is paid to providers using the process explained in section h.

## **k) Disability Access Funding (DAF) in 2023/24**

- The DfE's Disability Access Funding (DAF) guidance is available here:

- <https://www.gov.uk/government/publications/early-years-funding-2023-to-2024/early-years-entitlements-local-authority-funding-operational-guide-2023-to-2024#disability-access-fund-daf>

- The DAF is allocated to children aged 3&4 who are accessing their entitlement hours at an early years provider in Bradford and who are also in receipt of the Disability Living Allowance (DLA). Children in receipt of the DLA do not have to be accessing all their entitlement hours to be eligible. Please note however, that 4 year olds in reception classes in maintained schools, academies or free schools are not eligible.

- DAF funding is allocated to support providers to make reasonable adjustments that will benefit the child and the setting as a whole. DAF cannot be used to pay for additional non-entitlement hours and non-entitlement services. Providers must discuss how the funding will be used with the child's parent or guardian.

- Parents / guardians are required to apply online. This can be accessed via the Authority's website:

<https://www.bradford.gov.uk/children-young-people-and-families/looking-for-childcare/childrens-disability-access-funding/>

- The application requires basic details about the parent / guardian, the name of the chosen provider, and a copy of the child's Disability Living Allowance award letter. Support is available for parents / guardians who may require help to make an application. Providers should signpost the Authority's website and provide the contact number 01274 431386. Applications are processed by the

Authority, who checks that the child is attending a provider in Bradford and that the child is in receipt of DLA. The parent / guardian is informed of the outcome of the application and, if successful, is given an award date and the date they can re-apply if their child is still accessing their early years entitlement. The provider the parent / guardian has chosen to receive the funding is also informed and is provided with details of the funding period.

- DAF is a lump sum payment, which the DfE states must be at least £828 per year per child in 2023/24. The Authority continues to enhance the value of payment per child in 2023/24 above this minimum, and proposes a value of £1,200 in 2023/24 (increased from £1,000 in 2022/23). DAF funding cannot be split between providers, so if a child is splitting their entitlement hours with more than one provider, the parent / guardian is required to nominate only one provider that will receive the full amount.
- The DAF is allocated for one calendar year with the funding period based on the grant award date. So, for example, if a child is awarded funding on the 30 October 2023 they can re-apply to be awarded again on the 30 October 2024 if they are still accessing their early years entitlement.
- If a child leaves after the funding has been awarded, the provider is not required to pay back any monies to the Authority.
- DAF is paid to providers using the process explained in section h.

#### **I) Early Years SEND Inclusion Fund (EYIF) in 2023/24**

- Local authorities are required to have an SEND Inclusion Fund for all 3 & 4 year olds with special educational needs and disabilities (SEND) who are taking up the entitlements, regardless of the number of hours taken. These funds are intended to support local authorities to work with providers to address the needs of individual children with SEND. This fund will also support local authorities to undertake their responsibilities to strategically commission SEND services as required under the Children and Families Act 2014. Local authorities are expected to target SEND Inclusion Funds at children with lower level emerging SEND. All early years providers that are eligible to receive funding for the entitlements for three and four year olds are also eligible to receive support from the SEN Inclusion Fund.
- The Authority's approach is set out in detail in Appendix 2.
- EYIF is paid to providers using the process explained in section h.

## SECTION 2

### m) The Entitlement for Eligible 2-year-olds in 2023/24

- Early education became a statutory entitlement for eligible 2-year-olds at 1 September 2013. Eligible children are defined as children who are looked after and children who meet the Free School Meals eligibility criteria.
- Providers have been funded in 2022/23 for 2-year-old entitlement delivery on a flat rate of £5.55 per child per hour.
- It is proposed that 2-year-old entitlement hours will continue to be funded in 2023/24 on a flat rate per child per hour, which is proposed at **£5.61**. There are no additional supplements.
- 2-year-old entitlement delivery is initially counted in the same way as it is for 3&4-year-olds, using the entitlement delivery data from individual providers that is recorded in the 3 termly censuses. However, the Authority collects additionally for the 2-year-old entitlement a second headcount each term. Funding on the basis of a second headcount supports the Authority to retain sufficient capacity and to more effectively fund providers for their delivery of provision to the most vulnerable children, who may not enter settings by the time the termly censuses are taken. This is especially the case for the autumn and spring terms when the censuses are collected relatively early. The second headcounts in 2023/24 will be taken on the following dates:
  - Summer term: 8 June 2023
  - Autumn term: 2 November 2023
  - Spring Term: 22 February 2024
- The timetabling and counting arrangements for the funding of the 2-year-old entitlement are otherwise the same as for the 3&4-year-old entitlement.
- All providers continue to be required to submit their 2-year-old entitlement delivery information to the Authority via the Bradford Provider Headcount Portal.
- Providers are paid for their delivery of the 2-year-old entitlement within their single monthly payment from the Authority, as explained in paragraph h.



## SECTION 3

### n) Who do I contact?

- The key Local Authority contacts for any queries about the EYSFF are:

**Maintained school and academy providers:** School Funding Team  
[schoolfundingteam@bradford.gov.uk](mailto:schoolfundingteam@bradford.gov.uk)

**Private, Voluntary & Independent providers:** Early Education Funding Team  
[EarlyEducationFund@bradford.gov.uk](mailto:EarlyEducationFund@bradford.gov.uk)

- Key contact details will be included in all correspondence relating to Indicative Budgets and adjustments to funding.

Appendix 1 – Timetable

Appendix 2 – Early Years SEND Inclusion Fund

Appendix 3 – Responses Questionnaire



## Appendix 1: Bradford District Early Years Single Funding Formula 2023/24 Timetable

Please read this timetable alongside the separate 'Technical Statement', which explains how the Early Years Single Funding Formula (EYSFF) will be applied across the Bradford District in the 2023/24 financial year.

| Date                  | Key Activity  |
|-----------------------|---|
| January 2023          | <p><b>a) Department for Education (DfE) January Census: w/c 16 January</b></p> <p><b>b) Deadline for consultation responses: 6 February</b></p>   |
| February / March 2023 | <p><b>a) 1<sup>st</sup> draft of Indicative Budgets for 2023/24 published week commencing 20 February</b></p> <ul style="list-style-type: none"> <li>• <u>Maintained / Academy providers</u> will be able to access on the Bradford Schools Online (BSO) website pre-calculated annual forecasted allocations for 2023/24 (calculated on estimated entitlement hours) as part of their S251 Budget Statements. Providers will then have approximately 2 weeks to review their estimates of entitlement hours, with the opportunity to change these up or down, prior to the publication of Confirmed Indicative Budgets.</li> <li>• <u>PVI providers</u> will be able to access on the Bradford Schools Online (BSO) website an electronic (Excel) Ready Reckoner, showing rates of funding for 2023/24 and allowing providers to calculate forecasted annual allocations using their own estimates of entitlement hours.</li> </ul> <p><b>b) Spring Term 2023 Adjustments Statement published week commencing 27 February</b></p> <ul style="list-style-type: none"> <li>• An initial reconciliation statement for all providers will be published, which will show the differences between estimated and actual spring term entitlement funded hours delivered and the value of adjustments due.</li> <li>• <u>Maintained / Academy providers</u> and <u>PVI providers</u> will be able to access this statement on the BSO website.</li> </ul> |
| March 2023            | <p><b>a) Confirmed Indicative Budgets for 2023/24 published week commencing 13 March</b></p> <ul style="list-style-type: none"> <li>• <u>Maintained / Academy providers</u>: Confirmed Indicative Budgets will establish the starting point for funding / payments for the 2023/24 financial year. These budgets will be different from the 1<sup>st</sup> draft where providers have asked for their estimates of funded hours to be altered. Where a provider has not asked for their estimates to be altered their Confirmed Indicative Budget will be the same as their 1<sup>st</sup> draft.</li> <li>• Confirmed Indicative Budgets will be published with a warning that these budgets are subject to change, for differences between currently estimated and actually delivered entitlement hours still to be recorded in the termly censuses.</li> <li>• Confirmed Indicative Budgets will be published in the same way as the 1<sup>st</sup> Draft Indicative Budgets.</li> <li>• At the same time the Confirmed Indicative Budgets are published, the Authority will provide a 'ready reckoner', which providers can use to anticipate likely adjustments to funding for their actual entitlement delivery.</li> </ul>   |

|                                |  |
|--------------------------------|--|
|                                | <p><b>b) Monthly Advances for <u>Maintained / Academy and PVI providers</u> amended to incorporate the Spring Term 2023 adjustment</b></p> <ul style="list-style-type: none"> <li>• For <u>Maintained / Academy providers</u>, the value of 2022/23 Local Authority I01 funding used to calculate the monthly advances will be amended in the final advances update in March 2023 to take account of the adjustment due from the January Census. This adjustment will impact on each school's March 2023 carry forward balances position. Schools should use the ready reckoner provided by the Authority to ensure that this adjustment is incorporated into their forecast of their year end balances position.</li> <li>• For <u>PVI providers</u>, any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment. A provider that has been overpaid must repay the value of overpayment by cheque or BACs by <b>30 April 2023</b>. Where a cheque or BACs payment is not received by 30 April 2023, the Authority will deduct the value of the outstanding overpayment from the next available monthly advance. This is likely to be in May 2023.</li> </ul> |
| <p><b>April 2023</b></p>       | <p><b>a) For <u>Maintained / Academy and PVI providers</u> initial payments for 2023/24 will begin</b></p> <ul style="list-style-type: none"> <li>• For <u>Maintained / Academy providers</u>, monthly advances for 2023/24 will be calculated from the final Section 251 Budget Statements and a schedule and breakdown of payments will be published at the beginning of April.</li> <li>• For <u>PVI Providers</u>, monthly payments for 2023/24 will begin. These will be based on the latest delivery information / latest estimates received from providers. Providers should consult the advances statement published on Bradford Schools Online at the beginning of April.</li> </ul>  |
| <p><b>May 2023</b></p>         | <p><b>a) May (Summer Term) Census: 18 May 2023</b></p> <ul style="list-style-type: none"> <li>• <u>Maintained / Academy providers</u>: it is intended that schools and academies will submit all their entitlement delivery information to the Authority Early Education Funding Team via the Bradford Provider Headcount Portal (replacing the use of the DfE Termly Census).</li> <li>• <u>PVI providers</u> will continue to submit their entitlement delivery information to the Authority Early Education Funding Team via the Bradford Provider Headcount Portal.</li> </ul>   |
| <p><b>June / July 2023</b></p> | <p><b>a) Summer Term Adjustments Statement published week commencing 26 June and payment adjustments actioned for PVI providers</b></p> <ul style="list-style-type: none"> <li>• A second headcount for 2 year olds will be taken on Thursday 8 June 2023.</li> <li>• A reconciliation statement for all providers will be published, which will show the differences between estimated and actual summer term entitlement hours delivered and the values of adjustments due. The adjustment will be a positive value (meaning that the Authority owes the provider more funding) where the number of entitlement hours delivered actually recorded in the May Census is greater than the delivery information used to make initial payments. The adjustment will be a negative value (meaning the provider must repay funding</li> </ul>  |

|                       |  |
|-----------------------|--|
|                       | <p>back to the Authority) where the number of entitlement hours delivered recorded in the May Census is lower than the delivery information used to make initial payments.</p> <ul style="list-style-type: none"> <li>• <u>Maintained / Academy and PVI providers</u> will be able to access the adjustment statements on the BSO website.</li> <li>• Adjustments will be made to the July 2023 payment for <u>PVI providers</u> (both positive and negative) for the re-calculation of summer term funding from the May Census. The August and September payments may also be adjusted, where the value of the July advance is not sufficient to permit full recovery of a negative adjustment.</li> </ul> <p><b>b) Deadline for <u>PVI providers</u> to notify the Local Authority, through the Bradford Provider Headcount Portal, of estimated delivery in the autumn term: Friday 28 July</b></p>   |
| <b>August 2023</b>    |  |
| <b>September 2023</b> | <p><b>a) Monthly Advances for <u>Maintained / Academy providers</u> amended to incorporate Summer Term adjustments</b></p> <ul style="list-style-type: none"> <li>• For Maintained / Academy providers, the value of Local Authority I01 funding used to calculate the monthly advances will be amended in September to take account of the adjustment due from the summer term.</li> </ul>  |
| <b>October 2023</b>   | <p><b>a) October (Autumn Term) Census: 5 October 2023</b></p> <ul style="list-style-type: none"> <li>• <u>Maintained / Academy providers</u>: it is intended that schools and academies will submit all their entitlement delivery information to the Authority Early Education Funding Team via the Bradford Provider Headcount Portal (replacing the use of the DfE Termly Census).</li> <li>• <u>PVI providers</u> will continue to submit their entitlement delivery information to the Authority Early Education Funding Team via the Bradford Provider Headcount Portal.</li> </ul>  |
| <b>November 2023</b>  | <p><b>a) Autumn Term Adjustments Statement published week commencing 6 November and payment adjustments actioned for <u>PVI providers</u></b></p> <ul style="list-style-type: none"> <li>• A second headcount of 2 year olds will be taken on Thursday 2 November 2023.</li> <li>• A reconciliation statement for all providers will be published, which will show the differences between estimated and actual autumn term entitlement hours delivered and the value of adjustments due.</li> <li>• <u>Maintained / Academy providers</u> and <u>PVI providers</u> will be able to access this statement on the BSO website.</li> <li>• Adjustments will be made to the November 2023 payment for <u>PVI providers</u> (both positive and negative) for the re-calculation of autumn term funding from the October Census. The December and January payments may also be adjusted, where the value of the November advance is not sufficient to permit full recovery of a negative adjustment.</li> </ul> |

|                                     |   |
|-------------------------------------|---|
| <p><b>December 2023</b></p>         | <p><b>a) Deadline for <u>PVI providers</u> to notify the Local Authority, through the Bradford Provider Headcount Portal, of estimated delivery in the spring term: Friday 1 December</b></p> <p><b>b) Monthly Advances for <u>Maintained / Academy providers</u> amended to incorporate Autumn Term adjustments</b></p> <ul style="list-style-type: none"> <li>For <u>Maintained / Academy providers</u>, the value of Local Authority I01 funding used to calculate the monthly advances will be amended in December to take account of the adjustment due from the autumn term.</li> </ul>   |
| <p><b>January 2024</b></p>          | <p><b>a) DfE January (annual) Census: 18 January 2024</b></p> <ul style="list-style-type: none"> <li><u>Maintained / Academy providers</u>: it is intended that schools and academies will submit all their entitlement delivery information to the Authority Early Education Funding Team via the Bradford Provider Headcount Portal (replacing the use of the DfE Termly Census).</li> <li><u>PVI providers</u> will continue to submit their entitlement delivery information to the Authority Early Education Funding Team via the Bradford Provider Headcount Portal.</li> </ul>   |
| <p><b>February 2024</b></p>         | <p><b>a) 1<sup>st</sup> Draft of Indicative Budgets / Ready Reckoners for 2024/25 Published</b> (see notes for February 2023)</p> <p><b>b) A second headcount of 2-year-olds will be taken on Thursday 22 February 2024.</b></p>  |
| <p><b>February / March 2024</b></p> | <p><b>a) Spring Term 2024 Adjustments Statement Published week commencing 26 February</b></p> <ul style="list-style-type: none"> <li>A reconciliation statement for all providers will be published, which will show the differences between estimated and actual spring term entitlement hours delivered and the value of adjustments due.</li> <li><u>Maintained / Academy providers</u> and <u>PVI providers</u> will be able to access this statement on the BSO website.</li> </ul> <p><b>b) Monthly Advances for <u>Maintained / Academy and PVI providers</u> amended to incorporate the Spring Term 2024 adjustment</b></p> <ul style="list-style-type: none"> <li>For <u>Maintained / Academy providers</u>, the value of Local Authority I01 funding used to calculate the monthly advances will be amended in the final advances update in March 2024 to take account of the adjustment due from the January Census. This adjustment will impact on each school's March 2024 carry forward balances position. Schools should use the ready reckoner to ensure that this adjustment is incorporated by schools into their forecast of their year end balances position.</li> <li>For <u>PVI providers</u>, any positive adjustment following the re-calculation of funding using the January Census actual numbers will be paid in a single additional payment. A setting that has been overpaid, must repay the value of overpayment by cheque or by BACs by <b>30 April 2024</b>. Where a cheque or BACs payment is not received by 30 April 2024, the Authority will deduct the value of the outstanding overpayment from the next available monthly advance. This is likely to be in May 2024.</li> </ul> |

|  |   |
|--|---|
|  | <b>c) Confirmed Indicative Budgets / Ready Reckoners for 2024/25 Published</b> (see notes for March 2023) |
|--|---|

The Local Authority has sought to plan this timetable as comprehensively as possible. Please note however, that all dates in this timetable are provisional and subject to change. Where we anticipate that any dates will significantly change, the Local Authority will do its best to notify all providers as soon as possible.





## Appendix 2 – Early Years SEND Inclusion (EYIF) Funding 2023/24

### Introduction

1. Whilst recognising that “children develop at their own rates and in their own ways” (EYFS Framework 2017), children with additional needs may benefit from additional support. All local authorities are required by the DfE to have an Inclusion Fund for 3 & 4 year olds with special educational needs and disabilities (SEND) who are taking their early years entitlements. Funding is allocated to promote the inclusion of children who may require high levels of support within a pre-5 setting. This funding also supports local authorities to undertake their responsibilities to strategically commission SEND services as required under the Children and Families Act 2014.
2. All early years providers that are eligible to receive funding for the 3 & 4 year old entitlements are eligible to receive support from the Early Years SEND Inclusion Fund. Bradford Local Authority currently also offers Early Years SEND Inclusion Funding to eligible 2 year olds, and will continue to do so in 2023/24, but this is non-statutory.
3. Local authorities are expected to target their Early Years SEND Inclusion Funds at children with lower level emerging SEND. ‘Emerging SEND’ is not defined within the DfE’s guidance. We define this as children, assessed as requiring SEND Support with assessed needs at the top of SEND Support and above, who do not have an Education Health and Care Plan (EHCP).
4. At the point an EHCP is put in place for a child, the resources allocated via this EHCP will replace Inclusion Funding.
5. The Deprivation and SEND supplement within Bradford’s Early Years Single Funding Formula (EYSFF) already allocates an amount of additional funding that providers should use to meet the needs of 3 & 4 year olds with emerging SEND. Additional grant funding is also available to support these children, including the Early Years Pupil Premium and the Disability Access Fund (DAF) grant. This funding must be utilised in the first instance prior to claiming Inclusion Funding.

### Bradford – Holistic Model:

6. Our Early Years Inclusion Funding model is established on the following basis:
  - Applications are made by providers on an individual child basis using a prescribed referral form. Providers are required to fully evidence that the needs of the child have been appropriately assessed, that the provider has already made adjustments to meet the child’s needs and that the provider has also accessed all available resources e.g. DAF and Early Years Pupil Premium. The referral form asks the provider to set out why additional funding is now required and the level of support (number of hours of support) requested. Decisions will be taken by a Panel.
  - This Panel will consider 4 matters in each application:
    - **Decision 1:** Whether, against the agreed criteria, the child is eligible for Inclusion Funding.
    - **Decision 2:** The number of hours (of the child’s entitlement) support will be funded for.
    - **Decision 3:** The rate of funding per hour.
    - **Decision 4:** The number of terms (or weeks) that support is to be funded for and the expiry date.

7. **Decision 1** – the **eligibility criteria** are:

- The provider must be registered with Ofsted on either the Early Years Register or the Childcare Register or must be legally exempt from this registration.
- Inclusion Funding will only be allocated to children aged 2, 3 or 4 who
  - Are taking their early years entitlements, up to a maximum of 15 hours (2 year olds) and 30 hours (3&4 year olds), and
  - In their application, the provider must evidence that a child is eligible for Early Years Inclusion funding. This evidence could include:
    - *2- year olds*: EYFS development levels are approximately from 10 to 17 months behind chronological age in two or more prime areas (for example, Cognition and Learning, Communication and Interaction, Social Emotional and Mental Health Needs and Sensory and/or Physical).
    - *3- year olds*: EYFS development level are approximately from 18 to 25 months behind chronological age in two or more prime areas (for example, Cognition and Learning, Communication and Interaction, Social Emotional and Mental Health Needs and Sensory and/or Physical).
    - *4-year olds*: EYFS development levels are approximately from 21 to 31 months behind chronological age in two or more prime areas (for example, Cognition and Learning, Communication and Interaction, Social Emotional and Mental Health Needs and Sensory and/or Physical).
    - The child may have been referred to and / or be known to one or more health and/or education professionals.
    - It would be expected that the early years provider intends to or has put in place a cycle of Assess, Plan, Do and Review.
    - Information required to demonstrate that the child is experiencing a delay in some of their developmental milestones.

and

- Are likely to require small group interventions and / or structured early years experiences with high adult to child ratio of support required for up to 15% - 20% of time at setting, and
  - Do not have an Education Health and Care Plan, and
  - Are not placed in an Early Years Enhanced Specialist Provision or in a special school (as these places are already funded at a higher level), and
  - Are not in paid for childcare, and
  - Are not in an upper foundation class in a maintained primary school.
- In their application, the provider must also evidence:

- That Wave 1 interventions (Quality First Teaching) are in place for all children and that a graduated response has taken place, evidencing a clear review process and the need for targeted Wave 2 Interventions as advised by professionals from appropriate services.
- That the parent or carer of the child has been a partner in the whole process.
- Where appropriate, an EA1 Notification from Health has been received for the child.
- Where a child is newly arrived in the country, advice from other services (for example, Health Visitors, Paediatricians, Paediatric Therapists, and Specialist Teaching and Support Services) has been gathered to support the request.
- That the provider has exhausted all avenues of support available to them from within existing funding.
- That reasonable adjustments to meet the needs of the child have already been made. This includes how the provider has used the DAF and / or Early Years Pupil Premium, if the child is eligible.
- Why existing staffing is insufficient to meet the child's needs.

8. **Decision 2 – The number of hours to be funded.** The approach is as follows:

- The provider must set out in the application both the number of entitlement hours per week the child is taking with the provider as well as the number of hours per week the provider is requesting funded support for.
- The Panel will determine whether the provider's requested hours is accepted or amended. The Panel will translate this into a % of funding based on the hours a child attends their early education entitlement per week.
- The Panel will assume that the weekly entitlement is delivered across 38 weeks per year and providers will be allocated monies on this basis.

9. **Decision 3 – The rate of funding per hour,** is set at a standard (maximum) of £6.32.

- The national SEND 'Place-Plus' funding framework is based on the financial definition of a 'High Needs' child being one whose education, incorporating all additional support, costs more than £10,000 per annum (1 FTE). This threshold lays the foundation of the definition of the financial responsibility that schools, academies and other education providers have for meeting the needs of children from their delegated budgets.
- Schools are required to meet the first £10,000 of cost for children with SEND, both with and without EHCPs, from their core formula-funded budgets. This £10,000 is separated in the pre-16 national model into Element 1, at a value of £4,000 per 1 FTE (25 hours) and Element 2, at a value of £6,000 per 1 FTE (25 hours). Element 1 £4,000 represents the core funding that all pupils attract. In the Early Years Single Funding Formula, Element 1 is allocated through the Setting Base Rates, which in 2023/24 are **£5.61** for 2 year olds and **£4.46** for 3&4-year-olds. Element 2 £6,000 is the contribution that schools are required to make from their 'notional SEND' budgets, which are derived from additional funding allocated using proxy indicators of additional needs, such as deprivation and low prior attainment. Element 2 is not present in the Early Years Single Funding Formula, although the Deprivation and SEND supplement within the 3&4-year-old formula does allocate a small amount of additional funding. As a result, the primary function of the Early Years SEND Inclusion Fund is to allocate Element 2 funding to children with emerging SEND.

- So we define Element 2 as an amount per child per hour as follows:

£6,000 / 25 hours (1 FTE) / 38 weeks = **£6.32 per hour**. So, for example:

A child accessing 15 hours early education entitlement per week, term time only, with 5 hours of funded support = £6.32 x 5 x 38 = £1,201 (this would equate to 33% funding).

A child accessing 30 hours early education entitlement per week, term time only, with 15 hours of funded support = £6.32 x 15 x 38 = £3,602 (this would equate to 50% funding).

10. **Decision 4** – The number of weeks or terms that support is to be funded for and the expiry date. This would be determined by the Panel, taking account of the pupil's age, needs-assessment and timescale for transfer into reception. We would typically expect the time period to be expressed in terms e.g. 1, 2 or 3 terms and we would expect all funding decisions to be reviewed at least annually. Funding is non-transferrable between providers and would cease when a child leaves a provider. Where a child leaves a provider part way through a half term then there would be a grace period for the remainder of that half term. The provider must inform Bradford Council if a child in receipt of Inclusion Funding leaves their setting/school. Any additional unspent funding after the end of that half term would be reclaimed by Bradford Council. Funding will cease when an EHCP is put in place.

#### Note - Payment of EYIF Funding to Private, Voluntary and Independent Providers (PVI)

11. Following each monthly panel meeting, confirmation is sought from the Early Education Funding Team, to ensure that a child is eligible for early education entitlement, before funding is released to the provider. This check take place after the termly headcount deadline. Therefore, there may be a delay in payment at the start of a term.
12. All EYIF applications are funded at the hourly rate of £6.32. Providers in the Bradford Local Authority will receive payment via the Schools Funding Team (SFT) and Inclusion Funding will be paid alongside the early education funding, directly into the provider's bank account. Please note that Inclusion Funding payments are not itemised on the SFT payment remittance. However, providers can log onto Bradford Schools Online to refer to their payment schedule, which will identify how much Inclusion Funding will be paid that month. This payment schedule will have a reference of 'Spring/Summer/Autumn Term SEND (EYIF)'. Providers will also receive an EYIF Outcome Summary via email, which will confirm how much funding has been agreed for individual children and the period of funding allocated.
13. Providers that are based out of Bradford Local Authority receive Inclusion Funding via a service level agreement.

# RESPONSES FORM

## Consultation on the Early Years Single Funding Formula 2023/24

Name \_\_\_\_\_ Setting Name \_\_\_\_\_

**THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS MONDAY 6 FEBRUARY 2023**

This form can be used to submit your response. However, this year we have introduced a web-based questionnaire, which we encourage you to use to submit your response, instead of using this paper form. Please access the web-based questionnaire [here](#).

Alternatively, please send completed questionnaire responses to:

School Funding Team  
City of Bradford Metropolitan District Council  
6th Floor, Britannia House,  
Hall Ings  
Bradford  
BD1 1HX

Email: [schoolfundingteam@bradford.gov.uk](mailto:schoolfundingteam@bradford.gov.uk)

Please complete the questionnaire by marking the appropriate boxes. There is a space below each question for you to record comments.

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**Question 1 – Do you agree with the proposal to retain our existing timetabling and counting arrangements for the operation of Bradford’s EYSFF in 2023/24 (see Section 1 paragraphs D through to H (pages 20 to 25) and Section 2 (page 28))? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:

**Question 2 – Do you have any additional comments on how we could improve our proposed operational and counting arrangements?**

Please comment here:

**Question 3 – Do you agree with the proposal to continue to fund the 2-year-old entitlement only on a single flat Universal Base Rate of funding per hour, without additional supplements (see Section 2 page 28)? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:

**Question 4 – Do you agree with the proposal to set the value of the 2-year-old Universal Base Rate in 2023/24 at £5.61 per hour (see Section 2 page 28)? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:

**Question 5 – Do you agree with the proposal to set the value of the 3&4-year-old Universal Base Rate in 2023/24 at £4.46 per hour (see Section 1 page 19)? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:

**Question 6 – Do you agree with the introduction of a Quality Supplement in 2023/24 within our 3&4-year-old EYSFF, as proposed (see paragraph 2 page 7 and Section 1 C page 20)? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:

**Question 7 – Do you have any additional comments on the proposed new Quality Supplement, including on how it is proposed to be constructed?**

Please comment here:

**Question 8 – Do you agree with the proposal to now action in 2023/24 the previously identified and planned reduction, from 8.00% to 7.00%, in the % of our 3&4-year-old EYSFF funding that is allocated via the Deprivation & SEND supplement, in support of maximising the value of the Universal Base Rate in 2023/24 (see paragraph 1.10 page 5)? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:

**Question 9 – Do you agree with the proposal to increase the value of the Disability Access Fund (DAF) grant to providers in 2023/24, from £1,000 to £1,200 (see paragraph K page 26)? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:

**Question 10 – Do you agree with the proposal to continue, with the uplift that is proposed, our existing protection arrangements for maintained nursery schools in 2023/24 (see paragraph 1.10 page 6)? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:

**Question 11 – Do you agree with the proposal to allocate the former Teacher Pay and Pensions Grant funding streams to maintained nursery schools, via a new fixed lump sum within the Maintained Nursery School Lump Sum Sustainability Factor, as proposed, rather than via the Quality Supplement (see paragraph 1.10 page 6)? If not, please can you explain why not.**

**Strongly Agree**       **On Balance Agree (some reservations)**       **Strongly Disagree**

If not, please provide further explanation here:



**Question 12 – Do you have any additional comments on the proposed new fixed lump sums for maintained nursery schools?**

Please comment here:

**Question 13 – Do you agree with the Authority’s proposal to continue to use the existing holistic Early Years SEND Inclusion Fund approach that is set out in Appendix 2 (see page 37)? If not, please can you explain why not.**

**Strongly Agree**

**On Balance Agree (some reservations)**

**Strongly Disagree**

If not, please provide further explanation here:

**Question 14 – Are there any changes that you would like to see made to the Early Years Single Funding Formula (EYSFF) that have not been proposed?**

Please comment here:

**Question 15 – Do you have any other comments that you have not made elsewhere in your response, including matters that you would wish to be included in the Authority’s continued review of the EYSFF for future years?**

Please comment here:

| 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)                               | 509,389,606   | 116,884,377      | 43,370,802        | 3,558,643                      | 673,203,427 |
| % of total DSG by Block  | 75.7%         | 17.4%            | 6.4%              | 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)   | 25,014,325    | 11,695,450       | 1,632,584         | 27,499                         | 38,369,857  |
| D) TOTAL ESTIMATED PLANNED EXPENDITURE 2023/24 SCHOOLS BUDGET  | 511,176,725   | 121,084,301      | 44,328,188        | 3,612,355                      | 680,201,568 |
| 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)   | -1,787,119    | -4,199,924       | -957,386          | -53,712                        | -6,998,140  |
| 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                      | 818,086       | 920,000          | 957,387           | 0                              | 2,695,473   |
| J) BALANCE BROUGHT FORWARD FROM 22/23 TO SUPPORT BLOCK OVERSPEND IN 23/24 (POSITIVE) OR UNDER SPEND IN 23/24 TO RETAIN (NEGATIVE)      | 969,033       | 3,279,924        | 0                 | 53,712                         | 4,302,668   |
| 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)   | 5,342,661     | 25,829,679       | 4,211,337         | 281,158                        | 35,664,835  |
| N) ESTIMATED BLOCK BALANCE TO BE CARRIED FORWARD INTO 2024/25 AFTER ROWS I + J (positive = surplus)                                    | 3,555,543     | 21,629,755       | 3,253,950         | 227,446                        | 28,666,694  |
| 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)                            | 1,319,606     |                  |                   |                                | 1,319,606   |
| 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     |

**Further Explanation of the 2023/24 DSG Forecasted Position**

|   | Schools Block     | High Needs Block  | Early Years Block | Central Schools Services Block | Total DSG         |
|---|-------------------|-------------------|-------------------|--------------------------------|-------------------|
| S) Change in Estimated DSG Income vs. 2022/23 (ROW C) (negative = reduction)  |                   |                   |                   |                                |                   |
| Adjustment to Schools, High Needs & Central Schools Services Block funding from the net change in pupil / place numbers October 2022 vs. October 2021                     | 548,151           | 216,745           |                   | -1,209                         | 763,688           |
| Transfer of Mainstream Schools Supplementary Grant funding into the Schools Block   | 13,892,962        |                   |                   |                                | 13,892,962        |
| Additional Schools & Central Schools Services Block funding from NFF-led increases in per pupil monies (Primary +2.0%; Secondary +2.4%; CSSB +2.2%)                       | 10,220,701        |                   |                   | 73,736                         | 10,294,437        |
| Reduction in the Central Schools Services Block from the continued NFF-led reduction in historic commitments funding (reduced by a further 20%)                           |                   |                   |                   | -45,028                        | -45,028           |
| Additional RPIX-based allocation for the BSF (PFI) factor within the Schools Block (RPIX at 11.2%)  | 890,768           |                   |                   |                                | 890,768           |
| Change in Schools Block funding for premises related non-NFF factors (Business Rates (NDR) and Split Sites)   | -47,694           |                   |                   |                                | -47,694           |
| Change in Schools Block funding to support the cost of in year pupil growth based on October 2022 Census vs. October 2021 Census and using the DfE's formula              | -490,564          |                   |                   |                                | -490,564          |
| Additional High Needs Block funding as a result of the DfE's National Funding Formula announced in July 2022 (+ 6.8% per pupil increase; + 6.4% cash increase)            |                   | 6,610,353         |                   |                                | 6,610,353         |
| Additional High Needs Block funding announced on 16 December 2022, as a result of the 17 November Autumn Statement  |                   | 4,763,768         |                   |                                | 4,763,768         |
| Change in High Needs Block funding related to Education in Hospital / Medical Needs provision (5% increase on the 2022/23 discrete allocation)                            |                   | 104,584           |                   |                                | 104,584           |
| Transfer of Early Years Teacher Pay and Pensions Grants into the Early Years Block (at £0.14 per hour)  |                   |                   | 898,484           |                                | 898,484           |
| Estimated change in the Disability Access Fund & Early Years Pupil Premium allocations within the Early Years Block (including changes in rates of funding)               |                   |                   | 54,243            |                                | 54,243            |
| Estimated change in the value of the Maintained Nursery School Supplement within the Early Years Block (including uplifts, estimated numbers adjustments and TPG / TPENG) |                   |                   | 210,815           |                                | 210,815           |
| Estimated change in Early Years Block monies allocated by the 23/24 settlement (NFF-led), incorporating entitlement no.s changes - 3&4 Year Olds (+1%; +£0.05 per hour)   |                   |                   | 393,721           |                                | 393,721           |
| Estimated change in Early Years Block monies allocated by the 23/24 settlement (NFF-led) incorporating entitlement no.s reduction - 2 Year Olds (+1%; +£0.06 per hour)    |                   |                   | 75,321            |                                | 75,321            |
| <b>Total of Change in 2023/24 DSG Income vs. 2022/23</b>  | <b>25,014,325</b> | <b>11,695,450</b> | <b>1,632,584</b>  | <b>27,499</b>                  | <b>38,369,857</b> |

|   | Schools Block | High Needs Block | Early Years Block | Central Schools Services Block | Total DSG |
|---|---------------|------------------|-------------------|--------------------------------|-----------|
| T) Highlight of Specific Expenditure Items within 2023/24 Planned Budget shown in ROW D   |               |                  |                   |                                |           |
| New value of De-Delegated funds to be 'top-sliced' from maintained primary & secondary school budgets in 2023/24 within the Schools Block                                   | 947,437       |                  |                   |                                | 947,437   |
| New value of Growth Fund taken from the 2023/24 Schools Block allocation for primary & secondary schools and academies (after recoupment adjustment)                        | 796,883       |                  |                   |                                | 796,883   |
| New value of Falling Rolls Fund taken from the 2023/24 Schools Block allocation for primary schools and academies (no new budget is taken)                                  | 0             |                  |                   |                                | 0         |
| Cost of (value of) Minimum Funding Guarantee protection for individual primary & secondary schools and academies within the Schools Block (MFG set at +0.5%)                | 1,733,007     |                  |                   |                                | 1,733,007 |
| Cost of (value of) Minimum Levels of Per Pupil Funding for primary & secondary schools and academies within the Schools Block (£4,405 primary; £5,715 secondary)            | 2,386,741     |                  |                   |                                | 2,386,741 |
| Cost of (value of) DSG Affordability Gap charge for BSF (PFI) within the Schools & High Needs Blocks  | 8,002,943     | 917,000          |                   |                                | 8,919,943 |
| New value of the Early Years SEND Inclusion Fund funded from the 2023/24 Early Years Block allocation (£0.55m 3&4 year olds; £0.10m 2 year olds)                            |               |                  | 650,000           |                                | 650,000   |
| New value of centrally retained budgets funded from the 2023/24 Early Years Block allocation (excluding the contribution to EY SEND services - see below)                   |               |                  | 901,797           |                                | 901,797   |
| Estimated Cost of (value of) protection of Maintained Nursery Schools within the Early Years Block  |               |                  | 1,472,064         |                                | 1,472,064 |
| Estimated Cost of the Quality Supplement within the Early Years Block for school-based nursery classes (in response to the transfer of the Teacher Pay and Pensions Grants) |               |                  | 706,827           |                                | 706,827   |
| New value of budget for SEND centrally managed teaching support services funded from the 2023/24 High Needs Block and Early Years Block                                     |               | 5,715,000        | 366,000           |                                | 6,081,000 |
| Estimated cost of the new condition, attached to the £4.76m High Needs Block funding, to allocate an additional 3.4% per place to Special and PRU / AP                      |               | 1,392,986        |                   |                                | 1,392,986 |
| Funding for additional SEND places under development within the 2023/24 High Needs Block Planned Budget   |               | 4,226,778        |                   |                                | 4,226,778 |

|  | Schools Block | High Needs Block | Early Years Block | Central Schools Services Block | Total DSG |
|--|---------------|------------------|-------------------|--------------------------------|-----------|
| U) Compliance with Regulatory Restrictions on Block spending and the movement of monies between DSG blocks   |               |                  |                   |                                |           |
| Planned Schools Block expenditure ROW D (excluding the use of brought forward balances ROWS I & J) as a % of DSG allocation 2023/24 ROW A                          | 100.00%       |                  |                   |                                |           |
| % spend of the 3&4 year old EYSFF in the Early Years Block on supplements (deprivation & quality). Excluding the use of balances and MNS protection. Must be <=12% |               |                  | 8.8%              |                                |           |
| % pass through rate to providers of 3&4 year old funding in the Early Years Block (excluding use of brought forward balance). Must be >=95%                        |               |                  | 96.7%             |                                |           |

|   | Schools Block     | High Needs Block  | Early Years Block | Central Schools Services Block | Total DSG         |
|---|-------------------|-------------------|-------------------|--------------------------------|-------------------|
| V) Planned DSG expenditure 2023/24 ROW D includes the following spending changes against the 2022/23 Planned Budget   |                   |                   |                   |                                |                   |
| High Needs, Early Years and Central Schools Services Blocks - Adjustment in the cost of the DfE Copyright Licences charge (+10.6% increase)                                   |                   | 7,472             | 3,487             | 38,854                         | 49,813            |
| CSSB - Adjustments to CSSB budgets for pay and inflation funded from the CSSB headroom; includes removal of the £50,000 contingency provision retained in 22/23               |                   |                   |                   | 42,357                         | 42,357            |
| SB - Primary & Secondary formula funding increased cost (formula as proposed using Oct 2022 Census data) including de-delegated funds   | 10,879,891        |                   |                   |                                | 10,879,891        |
| SB - Allocation of transferred Supplementary Grant monies to primary & secondary schools and academies via core funding formula (estimated)                                   | 13,892,962        |                   |                   |                                | 13,892,962        |
| SB - Estimated change in the cost of Business Rates (NDR) for Maintained Primary & Secondary schools only vs. 22/23 initial planned budget                                    | 364,931           |                   |                   |                                | 364,931           |
| SB - Change in the cost of the Split Site factor for Primary & Secondary schools and academies (non-NFF)  | 14,364            |                   |                   |                                | 14,364            |
| SB - Change in the on-going value of the Growth Fund (including provision for new Growth at September 2023) - Primary Phase   | -9,489            |                   |                   |                                | -9,489            |
| SB - Change in the on-going value of the Growth Fund (including provision for new Growth at September 2023) - Secondary Phase   | -245,125          |                   |                   |                                | -245,125          |
| SB - Change in the cost of 'Implicit Growth' (pupil numbers adjustments for core formula funding for new establishing free schools & academies)                               | 89,884            |                   |                   |                                | 89,884            |
| SB & HNB - Increase in Building Schools for the Future (PFI) DSG Affordability Gap cost, incorporating RPIX increase and re-profiling for academies                           | 1,066,889         | 91,900            |                   |                                | 1,158,789         |
| EYB - Adjustment for the change in DSG income for Early Years Pupil Premium and Disability Access Fund (DAF); includes increase in DAF and use of DAF reserve in 23/24        |                   |                   | -127,516          |                                | -127,516          |
| EYB - Estimated change in the cost of funding the delivery of the 2 year old entitlement vs. 2022/23 Planned Budget (including changes in the no. of delivered hours)         |                   |                   | 799,003           |                                | 799,003           |
| EYB - Estimated change in the cost of funding the delivery of the 3&4 YO entitlements vs. 2022/23 Planned Budget (inc. changes in delivered hours & quality supplement)       |                   |                   | 1,435,548         |                                | 1,435,548         |
| EYB - Increase in the Early Years SEND Inclusion Fund (EYIF) Budget in response to increase demand  |                   |                   | 150,000           |                                | 150,000           |
| EYB - Change in the value of budget provision, for nursery schools to access de-delegated funds, funded from the 2023/24 Early Years Block allocation                         |                   |                   | 24,681            |                                | 24,681            |
| EYB - Adjustment to the Early Years Block PVI Area Sencos budget; uplift for pay and inflation  |                   |                   | 12,000            |                                | 12,000            |
| EYB - Adjustment to the Early Years Block budget for the Authority's Early Years Function and EYSFF capacity, including uplift for pay and inflation                          |                   |                   | 430,000           |                                | 430,000           |
| EYB & HNB - Transfer of the Early Years SEND and Portage contribution back to the EYB; EYB budget includes uplift for pay and inflation                                       |                   | -332,000          | 366,000           |                                | 34,000            |
| HNB - Estimated change in the Place-Plus formula funding cost of existing special schools and special school academies, includes additional places                            |                   | 2,258,452         |                   |                                | 2,258,452         |
| HNB - Estimated change in the Place-Plus formula funding cost of existing Primary & Secondary School-led resourced provisions, including additional places                    |                   | -144,642          |                   |                                | -144,642          |
| HNB - Estimated change in the Place-Plus formula funding cost of Early Years Enhanced Specialist Provisions in Maintained Nursery Schools                                     |                   | 142,867           |                   |                                | 142,867           |
| HNB - Estimated change in the Place-Plus formula funding cost of Sensory Primary & Secondary LA-led resourced provisions  |                   | 107,209           |                   |                                | 107,209           |
| HNB - Estimated change in the Place-Plus formula funding cost of Primary & Secondary LA-Led resourced provisions SEMH & ASD, including additional places                      |                   | 541,632           |                   |                                | 541,632           |
| HNB - Estimated change in the Place-Plus formula funding cost of PRUs, AP Academies and placements with Alternative Providers   |                   | 148,645           |                   |                                | 148,645           |
| HNB - Estimated change in the Place-Plus formula funding cost of Further Education Settings and SPIs (Post 16 EHCPs)  |                   | 1,290,000         |                   |                                | 1,290,000         |
| HNB - Estimated growth in the cost of top-up for EHCPs in mainstream primary & secondary schools and academies (pre & post 16), Early Years PVI, Personal Budgets             |                   | 5,048,000         |                   |                                | 5,048,000         |
| HNB - Estimated growth in cost of the SEND Funding Floor, including estimated provision for EHCP growth during 2023/24  |                   | 785,000           |                   |                                | 785,000           |
| HNB - Estimated change in cost of Teacher Pay and Pensions Grants to special schools, school-led RPs and AP providers vs. the 2022/23 planned budget                          |                   | -88,037           |                   |                                | -88,037           |
| HNB - Estimated growth in the cost of places in OLA, NMSS and independent provisions, including medical OLA provisions vs. the 2022/23 planned budget                         |                   | 7,000,000         |                   |                                | 7,000,000         |
| HNB - Estimated change in the cost of centrally managed Education in Hospital, Tracks and Medical Home Tuition provisions   |                   | 89,800            |                   |                                | 89,800            |
| HNB - Estimated cost of the new condition, attached to the £4.76m High Needs Block funding, to allocate an additional 3.4% in funding per place to Special and PRU / AP       |                   | 1,392,986         |                   |                                | 1,392,986         |
| HNB - capacity building - change in budget provision for additional specialist places not yet allocated to settings to be created over the 2022/23 and 2023/24 academic years |                   | 1,588,667         |                   |                                | 1,588,667         |
| HNB - Additional budget for Special School Inclusion Outreach (funded from HNB balances; within the Authority's Inclusion Investment Plan). To be reviewed summer 2023        |                   | 240,000           |                   |                                | 240,000           |
| HNB - Change (increase) in cost of SEND Teaching Support Services Budgets, including pay award / inflation provision and additional Inclusion Investment Plan spending        |                   | 1,032,001         |                   |                                | 1,032,001         |
| HNB - Net change in the estimated cost of smaller centrally managed HNB budgets (Speech & Language Therapy & specialist equipment)  |                   | 3,200             |                   |                                | 3,200             |
| HNB - Removal of the contingency previously held for EHCP Banded Model implementation / embedding (stacking cost and band movements)  |                   | -1,000,000        |                   |                                | -1,000,000        |
| <b>Total Value of Change in Planned Spending 2023/24 vs. 2022/23 Planned Budget</b>   | <b>26,054,307</b> | <b>20,203,151</b> | <b>3,093,203</b>  | <b>81,211</b>                  | <b>49,431,871</b> |

|  | High Needs Block |
|--|------------------|
| W) Summary of High Needs Block Planned Budget Forecasted Spending 2023/24 by Spending Type |                  |

|  |                    |
|--|--------------------|
| SEND Specialist Places - Special Schools & Special School Academies  | 38,182,369         |
| SEND Specialist Places - Early Years Resourced Provisions in Maintained Nursery Schools - School Led   | 1,650,000          |
| SEND Specialist Places - Primary & Secondary Resourced Provisions - School Led   | 6,096,565          |
| SEND Specialist Places - Primary & Secondary Resourced Provisions - LA Led - Sensory   | 2,752,459          |
| SEND Specialist Places - Primary & Secondary Resourced Provisions - LA Led - SEMH & ASD  | 3,521,674          |
| Allocation of the former Teacher Pay and Pensions Grants to special schools, school-led resourced provisions and AP providers                  | 1,539,732          |
| AP - Specialist Places - PRUs, AP Academies & Alternative Providers  | 4,066,704          |
| Top-up for EHCPs in mainstream schools & academies (excluding the SEND Funding Floor), EY PVI EHCPs, Personal Budgets                          | 16,104,000         |
| SEND Funding Floor for mainstream primary & secondary schools and academies  | 2,650,000          |
| Element 2 and Top-up funding for EHCPs in the Further Education & SPLs sector (Post 16)  | 9,008,000          |
| Cost of out of Authority / Independent / NMSS Placements   | 21,750,000         |
| SEND Teaching Support Services funded by the High Needs Block  | 5,715,000          |
| Other Small Centrally Managed Budgets (Copyright Licences, Speech & Language Therapy, Specialist Equipment, Special School Inclusion Outreach) | 746,145            |
| Centrally Managed - Hospital Education (inc. OLA / independent), Tracks and Medical Home Tuition   | 1,583,000          |
| BSF / PFI DSG High Needs Block Affordability Gap   | 917,000            |
| SEND Specialist Places - Further budget provision for new places under development (still to go through statutory processes)                   | 3,408,667          |
| Allocations, attached to the £4.76m High Needs Block funding, to provide an additional 3.4% in funding per place to Special and PRU / AP       | 1,392,986          |
| <b>Total Planned High Needs Block Budget 2023/24</b>   | <b>121,084,301</b> |

X) **Schools Block 2023/24 - Phase Breakdown**

|   |                |
|---|----------------|
| Primary - value of specific phase-led funding (EGUF of £4,929 per pupil) within the Schools Block   | 262,227,619    |
| Primary - value of specific phase-led core formula funding spending within the Schools Block, excluding implicit growth, before the use of reserve balances   | 262,975,114    |
| <b>Primary - Difference (positive = higher spend) *</b>   | <b>747,496</b> |
| Secondary - value of specific phase-led funding (EGUF of £6,551 per pupil) within the Schools Block   | 233,458,714    |
| Secondary - value of specific phase-led core formula funding spending within the Schools Block, excluding implicit growth, before the use of reserve balances | 233,850,452    |
| <b>Secondary - Difference (positive = higher spend) *</b>   | <b>391,738</b> |

\* note that these calculations exclude spending from combined-phase budgets (where a single non-phase specific allocation is received within the Schools Block e.g. Growth Fund, Falling Rolls Fund, Business Rates)

Notes to the Table Above (referenced by row A to R)

A) Estimated DSG 2023/24 allocation

As announced by the DfE on 16 December 2022. The DSG allocation across the 4 blocks at local authority level now follows a National Funding Formula methodology.

Local authorities are permitted to transfer monies between the Early Years, Central Schools Services and High Needs Blocks provided that, for the Early Years Block, the central spending restriction of 5% is not breached. Local authorities are permitted to transfer monies into the Schools Block from other blocks. However, the Schools Block itself is 'ring-fenced', except that a maximum of 0.5% of the Schools Block can be transferred to the High Needs Block with the approval of the Schools Forum following consultation with schools. Transfers of a value greater than 0.5% require Secretary of State approval.

The Schools Block and High Needs Block values are shown prior to recoupment and NNDR deductions for academies. The ESFA funds academies directly and deducts this cost from the DSG paid to the Local Authority.

The Central Schools Services Block was established at April 2018. A no. of items previously funded in the Schools Block are transferred. This ended Schools Block 'toplicing' for all but de-delegated funds and Growth / Falling Rolls Funds. The Central Schools Services Block contains within it a sum of £180,114 relating to historic commitments. This is reduced by 20% on the value funded in 2022/23 and is expected to reduce further in 2024/25 and eventually cease. The Central Schools Services Block income is otherwise calculated on the formula of £38.03 per pupil x October 2022 census numbers (primary & secondary numbers only).

There are elements of High Needs Block income that are still to be confirmed, including the adjustment for imports and exports between authority areas. We were set to receive an increase of 6.8% per pupil in funding through the High Needs Block National Funding Formula (NFF) in 2023/24, as announced in July 2022. We have however, received a further £4.76m (equating to an additional 4.9% per pupil) in the High Needs Block, as a result of the 17 November Autumn Statement. So, in total, we have received an additional £11.7m (+ 11.7% per pupil) The High Needs Block includes a specific allocation for Education in Hospital provision of £2.20m. We still await the publication of the DfE's consultation on future funding arrangements in this area. Within the NFF there is an allocation of £4,661 for all places in special schools occupied in Oct 2022. We have 46.5 more pupils in our special schools and in independent special schools and have received £217k more funding through this NFF factor.

Early Years Block income is significantly estimated and will only be confirmed following the collection of Jan 2023 and Jan 2024 censuses. Cash income estimates are calculated using the DfE's numbers, which go back to the January 2022 Census. Our confirmed Early Years Block 3 / 4 year old rate of funding per FTE pupil / per hour received from the DfE in 2023/24 is 

|        |       |
|--------|-------|
| £4,798 | £5.05 |
|--------|-------|

 per hour. This 2023/24 3 & 4 year old funding rate is + £0.19 (+3.9%) per hour compared with 2022/23. However, £0.14 of this increase comes purely from the transfer of the Early Years Teacher Pay and Pensions Grants. Our confirmed Early Years Block 2 year old rate of funding per FTE pupil / per hour received from the DfE in 2023/24 is 

|        |       |
|--------|-------|
| £5,349 | £5.63 |
|--------|-------|

 per hour. This 2023/24 2 year old funding rates is + £0.06 (+1.1%) per hour compared with 2022/23. The estimate of Early Years Block income includes the Maintained Nursery School Supplement at an estimated value of (including the transfer of the TPG and TPENG) 

|            |
|------------|
| £1,232,455 |
|------------|

Under National Funding Formula, the Schools Block is now funded on phase-specific primary and secondary £apps plus specific additional cash allocations for premises and for other factors. The phase-specific £app allocations for core formula funding are detailed above in section X. The additional Schools Block cash allocations for 2023/24 are as follows:

|  |                   |  |
|--|-------------------|--|
| Business Rates   | 3,738,984         | allocated on the 2022/23 planned budget        |
| Split Sites  | 425,398           | allocated on the 2022/23 planned budget        |
| PFI (Building Schools for the Future)                  | 7,712,892         | allocated on the 2022/23 planned budget + RPIX |
| In year Growth (explicit and implicit)                 | 1,825,999         | allocated via the DfE National Funding Formula |
| <b>Total Schools Block Additional Cash Allocations</b> | <b>13,703,273</b> |  |

B) 2022/23 DSG allocation

The 2022/23 DSG figures for the Schools, High Needs and Central Schools Services Blocks match the allocations published by the DfE, updated in November 2022. The 2022/23 Early Years Block figure is still estimated and still based on January 2022 Census numbers. The final allocation will only be confirmed in July 2023 (with 7/12ths based on January 2023 numbers)

C) Difference in DSG allocation

This row shows by how much the 2023/24 DSG allocation is estimated to increase or to reduce by vs. the current 2022/23 DSG figures. A breakdown of the reasons for growth or reduction in income is given in Section S.

D) Total estimated planned expenditure 2023/24 Schools Budget

This row shows the total planned expenditure by block, which incorporates all items and adjustments listed under Section V of this report. Any changes to these items will affect the total block positions shown in Row G and Row L. The main recommendations document (Document PQ) lists the key decisions that form the basis of the calculations. Costs in the Schools Block and High Needs Block are calculated on the assumption that the Schools Forum will recommend the formula funding proposals that have already been set out for consultation. Costs in the Early Years Block are calculated on the assumption that the Early Years Single Funding Formula, as proposed in Document PK (but still to go through wider consultation with providers), will be agreed and implemented. Planned High Needs Block expenditure is calculated on the planned places presented in Document PP Appendix 2. Planned Central Schools Services Block expenditure, and centrally managed funds held within the Schools and Early Years Blocks, are shown in more detail in Document PN Appendix 1. Please note that the final cost of business rates (NNDR) to be charged to the Schools Block in 2023/24, in respect of maintained schools, is still to be confirmed. The charges are currently based on estimates. Please note however, that the NNDR charges to the 2023/24 Schools Block, in respect of academies, will not change from the figures we have used within the planned budget calculations.

E) Value of spending safety net

This row shows that there is no safety net provision (unallocated contingency provision) held within the 2023/24 DSG planned budget. Any increases in costs during 2023/24, that cannot be met elsewhere within the 2023/24 planned budget, will be required to be met from balances brought forward (or from the 2024/25 Dedicated Schools Grant allocation).

F) Value of 2023/24 Schools Budget proposed to write off a deficit balance brought forward from 2022/23

This row confirms that no value of Schools Budget in 2023/24 is being allocated to write off a deficit balance brought forward from 2022/23.

G) Total underspend / overspend on 2023/24 DSG allocation

This row shows the difference between total planned expenditure (Row D) and total DSG income (Row A) in 2023/24, by block. It shows the position before brought forward balances (reserves) are allocated in support of the expenditure, that is already included within 2023/24 Schools Budget Row D. It also shows the position before the transfer of any monies between blocks.

H) Proposed transfer of DSG income between blocks 2023/24

This row confirms that there are no transfers of income between DSG blocks in 2023/24.

I) Proposed allocation of balance brought forward from 2022/23 to support specific agreed items

This row shows the allocation of balances brought forward from 2022/23 (reserves) to specific expenditure items in 2023/24, which are:

- the allocation of an estimated £0.957m of Early Years Block reserve balance to support the cost of our the Early Years Single Funding Formula in 2023/24, which includes £0.120m for DAF.
- the allocation of £0.920m of High Needs Block reserve balance to support the cost of the Authority's Inclusion Investment Plan. The continuation of this Plan for the 2023/24 academic year will be reviewed in summer 2023.
- the allocation of £0.818m of Schools Block reserve, which is made up of a) the allocation of the £0.421m specific Primary EGUF monies and b) £0.397m to cover the increased cost of NNDR for maintained schools.

J) Proposed allocation of balance brought forward from 2022/23 to support block spend in 2023/24 (positive) or to Retain (negative)

For the Schools Block, this row shows the allocation of £0.969m of Schools Block balance to meet the additional cost of our proposed 2023/24 formula funding arrangements, when we have used the October 2022 Census dataset. For the High Needs Block, this row shows the allocation of £3.280m of High Needs Block balance to cover the estimated gap between expenditure and income in 2023/24. Please see Document PP (DSG Management Plan). For the Central Schools Services Block (CSSB), this shows the allocation of £0.05m of CSSB balance to the cover the estimated small gap between expenditure and income in 2023/24.

K) Additional non-DSG funds allocated to support DSG spending activity

This row confirms that there is no additional non-DSG sourced income allocated into the 2023/24 DSG planned budget.

L) Estimated final over or underspend position by block in 2023/24

This row shows the final 'balancing' position (to zero) of the DSG planned budget by block, and in total, after the allocation of brought forward balances (reserves) in support of expenditure. Row M then shows (repeats from Document PM Appendix 1) the estimated values of balances to be brought forward from 2022/23. Row N then shows (repeats from Document PM Appendix 2) the estimated values of balances to be carried forward into 2024/25. Row O then shows (repeats from Document PN Appendix 2) the estimated total value of Schools Block de-delegated funds balances to be brought forward from 2022/23. Row P then shows (repeats from Document PM Appendix 1) the estimated value of the Schools Block Growth Fund balance to be brought forward from 2022/23. Row Q then shows (repeats from Document PM Appendix 1) the estimated value of the Schools Block Falling Rolls Fund balance to be brought forward from 2022/23. Row R then shows (repeats from Document PM Appendix 1) the estimated value of the Early Years Block DAF Fund balance to be brought forward from 2022/23.

Table with columns: DSG BLOCK and FUND NAME, Confirmed Balance Brought Forward (BFB) from 2021/22, 2022/23 Planned Budget (excluding use of BFB), Planned Use of BFB in 2022/23 (January 2022), Total of Planned Spending in 2022/23 (January 2022), Adjustment for academy ESFA direct funding (inc. estimates), Adjustment to DSG Allocation after January 22 (inc. estimates), 2022/23 Revised Planned Budget Spending after DSG adjustments, Total Forecasted Actual Spending up to 31 March 2023, Variance between Actual Forecasted & Revised Planned Budget Spending (negative = overspend), Estimated Carry Forward Balance at 31 March 2023 (negative = deficit), Comments.

CENTRAL SCHOOLS SERVICES BLOCK

Table with columns: Schools Block Copyright Licences (Schools Block element only), Schools Forum cost contribution, Pupil Admissions, Former Education Services Grant Local Authority duties all schools & academies, Education Access Officers, Education Planning and Consultation, CSSB reserve brought forward from 2021/22 / Resilience reserve, Total Central Schools Services Block.

EARLY YEARS BLOCK

Table with columns: 3&4 Year Old Early Years Single Funding Formula Allocations & EYB DSG funding 2022/23, 2 Year Old Early Years Single Funding Formula Allocations & EYB DSG funding 2022/23, Early Years Disability Access Fund (DAF), Early Years Pupil Premium, Early Years SEND Inclusion Fund, Early Years Block access to De-Delegated Funds, Local Authority capacity Early Years Function and EYSFF, SEND Management (EY PVI Area SENCOS), Copyright Licences (re-charge of Early Years Block element), Total Early Years Block.

HIGH NEEDS BLOCK

Table with columns: Place Plus - Special Schools and Special School Academies, Place Plus - Early Years Enhanced Provisions, Place Plus - Primary & Secondary School-led Resourced Provisions, Place Plus - Sensory Primary & Secondary LA-led Resourced Provisions, Place Plus - LA-led Resourced Provisions, Place Plus - PRUs & Alternative Providers, Place Plus - Post 16 Further Education & SPIs, Place Plus - Former Teacher Pay and Pension Grants (allocated in addition to top-up), Place Plus - Budget Provision for Additional Places, Place Plus - Budget Provision for new EHCP Model Impact, Mainstream EHCPs including SEND Funding Floor, Early Years PVI, Personal Budgets, Independent, Non Maintained Special School & OLA Placements, Special Schools Inclusion Outreach Support, Education in Hospital & Medical Home Tuition Centrally Managed Services, Speech and Language Therapy Services, Specialist Equipment, Copyright Licences (re-charge of High Needs Block element), Building Schools for the Future DSG Affordability Gap - Special Schools & Special School Academies, SEND Teaching Support Services, High Needs Block Additional Supplementary Grant Funding, High Needs Block reserve brought forward from 2021/22, Total High Needs Block.

SUMMARY

Summary table with columns: Confirmed Balance Brought Forward (BFB) from 2021/22, Total Schools Block, Total Central Schools Services Block, Total Early Years Block, Total High Needs Block, GRAND TOTAL, CHANGE IN OVERALL VALUE OF DSG SURPLUS MARCH 2023 VS. MARCH 2022.

Summary table with columns: Variance between Actual Forecasted & Revised Planned Budget Spending (negative = overspend), Estimated Carry Forward Balance at 31 March 2023 (negative = deficit).

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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                                  |
| <b>Total of Balances (by Block) estimated to be carried forward from 2022/23 into 2023/24</b>  | <b>5,342,661</b> | <b>4,211,337</b>  | <b>25,829,679</b> | <b>281,158</b>                 | <b>35,664,835</b> | 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>22.1%</i>      | <i>7.9%</i>                    | <i>5.3%</i>       |  |
| <b>1) Proposed to be allocated within the 2023/24 Schools Budget for specific agreed additional expenditure</b>  |                  |                   |                   |                                |                   |  |
| Remaining Primary £GUF Balance allocated to support the cost of Primary Phase Data Lag   | 421,260          |                   |                   |                                | 421,260           | Further discussed in Document PQ (full recommendations list)                           |
| Balance to be used in support of NNDR (Business Rates) cost increases until reimbursement via the APT - estimated  | 396,826          |                   |                   |                                | 396,826           | NNDR Re-evaluation April 2023 maintained schools. Reimbursement in 2024/25 via APT     |
| Balance to be used for Disability Access Fund (DAF) allocations in 2023/24   |                  | 120,000           |                   |                                | 120,000           | Please see Document PN (Early Years Block central funds)                               |
| Balance to be used in support of the 2023/24 Early Years Single Funding Formula (protection of UBRs) - estimated   |                  | 837,387           |                   |                                | 837,387           | Please see Document PK (2023/24 EYSFF consultation)                                    |
| Financing of the HNB Inclusion Plan  |                  |                   | 920,000           |                                | 920,000           | As discussed with the Forum July 2022. Indicatively planned full year spend            |
| <b>Total proposed to be allocated into the 2023/24 Schools Budget for specific additional expenditure (estimated)</b>  | <b>818,086</b>   | <b>957,387</b>    | <b>920,000</b>    | <b>0</b>                       | <b>2,695,473</b>  |  |
| <b>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</b> |                  |                   |                   |                                |                   |  |
| 2023/24 Schools Budget Support or Retention (Underspend). A negative = surplus retention into 2024/25  | 969,033          |                   | 3,279,924         | 53,712                         | 4,302,668         | Further discussed in Document PQ (full recommendations list)                           |
| <b>Total allocated to remove a deficit from the 2022/23 Schools Budget or to add an under-spend to balances</b>  | <b>969,033</b>   | <b>0</b>          | <b>3,279,924</b>  | <b>53,712</b>                  | <b>4,302,668</b>  |  |
| <b>3) Proposed Balances to be retained at 1 April 2023</b>   |                  |                   |                   |                                |                   |  |
| 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   |                  | 620,715           |                   |                                | 620,715           | Estimated balance net of £120k allocation above.                                       |
| 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  | 1,319,606        |                   |                   |                                | 1,319,606         | Retained to support Growth Fund cost in 2023/24 & on-going & new expected flexibility  |
| Block Resilience Reserve   | 938,854          | 2,561,526         | 21,629,755        | 227,446                        | 25,357,581        | Held for for DSG management planning / funding support in future years.                |
| <b>Total of Balances Proposed to be Retained at 1 April 2023</b>   | <b>3,555,543</b> | <b>3,253,950</b>  | <b>21,629,755</b> | <b>227,446</b>                 | <b>28,666,694</b> |  |
| <i>Retained Balance as a % of 2023/24 Block value</i>  | <i>0.7%</i>      | <i>8.0%</i>       | <i>21.4%</i>      | <i>0.0%</i>                    | <i>4.7%</i>       |  |
| <b>GRAND TOTAL BY BLOCK</b>  | <b>5,342,661</b> | <b>4,211,337</b>  | <b>25,829,679</b> | <b>281,158</b>                 | <b>35,664,835</b> |  |

DSG 71

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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).  | £38,007   | −£9,040  | −£5,149  | £32,859   |
| 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).   | £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.                                      | £552,523  | £75,777  | £213,761   | £766,284  |
| 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.   | £19,466   | −£2,378  | −£41,841   | −£22,375  |
| <b>Total Schools Block De-Delegated Funds</b> |  | <b>£936,870</b>   |   | <b>£947,437</b>   | <b>£10,567</b>   | <b>£797,083</b>  | <b>£1,744,519</b>   |

**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 is presented for the Schools Forum's approval in Document PQ Appendix 1. | £796,883  | £-254,614  | £1,319,606   | £2,116,489  |
| 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  |
| <b>Total Growth Fund &amp; Falling Rolls Fund</b> |  | <b>£1,051,498</b>   |   | <b>£796,883</b>   | <b>£-254,614</b>                                       | <b>£1,819,606</b>  | <b>£2,616,489</b>   |

### 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.                     | £406,355  | £38,854  | £0  | £406,355  |
| 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   | £227,446  | £227,446  |
| <b>Total Central Schools Services Block Funds</b> |  | <b>£3,531,144</b>   |  | <b>£3,612,355</b>   | <b>£81,211</b>   | <b>£227,446</b>   | <b>£3,839,801</b>   |

### 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.  | £119,330  | £24,681  | £71,709  | £191,039  |
| 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.   | £36,468   | £3,487   |  | £36,468   |
| 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 (budget however, is increased by £0.150m).   | £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 intial fund value is matched to the Early Years Block DSG EYPP grant value.   | £437,089  | £484   |  | £437,089  |
| 25  | EYSFF - Disability Access Fund  | £248,000  | To be delegated to providers during the year. Proposed to continue to enhance the value of DAF (increased to £1,200) 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).     | £120,000  | £-128,000  | £620,715   | £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 as presented to the Forum on 7 December (Document PI).  | £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  |
| <b>Total Early Years Block Funds</b>  |   | <b>£1,616,234</b>   |  | <b>£2,474,886</b>   | <b>£858,652</b>  | <b>£692,424</b>  | <b>£3,167,310</b>   |
| <b>Value of EYB Funds counted towards the 5% Central Budget restriction</b> |   | <b>£531,629</b>   |  | <b>£1,367,797</b>   |  |  |   |

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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                     | 38,007                                  |                         | 31,108              | 6,900                 |                                    |                                |                                  |                                    |                                |                                  |                                    |                                |                                  |              |
| 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                                 | 97,477                  | 552,523             |                       | £26.44                             | £26.44                         |                                  | £20.29                             | £20.29                         |                                  |                                    | £6.15                          | £6.15                            |              |
| Trade Union Facilities Time                         | 149,982                    | 129,790                                 | 15,977                  | 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                     | 19,833                                  | 2,441                   | 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                     | 22,900                                  | 3,434                   | 19,466              |                       | £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        |
| <b>TOTAL Value Of De-Delegated Funds / £APP</b>     | <b>1,031,518</b>           | <b>1,066,766</b>                        | <b>119,330</b>          | <b>889,692</b>      | <b>57,745</b>         | <b>£32.37</b>                      | <b>£41.09</b>                  | <b>£9.48</b>                     | <b>£26.22</b>                      | <b>£34.86</b>                  | <b>£9.42</b>                     |                                    | <b>£6.15</b>                   | <b>£6.23</b>                     | <b>£0.05</b> |

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 to be set against SIMB Grant.               |
| <b>Total Balance of De-Delegated Funds</b>           | <b>1,105,511</b>                   | <b>-236,720</b>   | <b>868,792</b>                             |   |

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 - Change in Contributions to De-Delegated Funds by Maintained School 2023/24 vs. 2022/23**

Document PN Appendix 3

*positive = increase in cost*

| Phase   | School                                 | 2022/23 Total De-Delegated Funds Contribution | 2023/24 Indicative Total De-Delegated Funds Contribution | Total Diff |
|---------|--|---|--|------------|
| PRIMARY | Addingham Primary School               | 7,240   | 7,883  | 643        |
| PRIMARY | All Saints' CE Primary School (Ilkley) | 12,382  | 14,533   | 2,151      |
| PRIMARY | Ashlands Primary School                | 12,190  | 13,669   | 1,479      |
| PRIMARY | Bankfoot Primary School                | 7,693   | 9,060  | 1,367      |
| PRIMARY | Ben Rhydding Primary School            | 6,833   | 7,795  | 961        |
| PRIMARY | Blakehill Primary School               | 14,713  | 17,459   | 2,746      |
| PRIMARY | Brackenhill Primary School             | 14,306  | 16,787   | 2,481      |
| PRIMARY | Burley & Woodhead CE Primary School    | 7,170   | 8,282  | 1,112      |
| PRIMARY | Burley Oaks Primary School             | 14,375  | 16,670   | 2,294      |
| PRIMARY | Carrwood Primary School                | 11,189  | 11,482   | 293        |
| PRIMARY | Cavendish Primary School               | 15,689  | 18,159   | 2,471      |
| PRIMARY | Crossflatts Primary School             | 15,107  | 17,940   | 2,834      |
| PRIMARY | Eastburn Junior and Infant School      | 7,490   | 8,581  | 1,091      |
| PRIMARY | Eldwick Primary School                 | 18,367  | 20,996   | 2,629      |
| PRIMARY | Fagley Primary School                  | 8,011   | 9,478  | 1,467      |
| PRIMARY | Farfield Primary                       | 14,885  | 17,588   | 2,704      |
| PRIMARY | Foxhill Primary School                 | 7,315   | 8,774  | 1,459      |
| PRIMARY | Frizinghall Primary School             | 13,863  | 15,935   | 2,073      |
| PRIMARY | Girlington Primary School              | 15,280  | 18,004   | 2,724      |
| PRIMARY | Heaton St Barnabas' CE Primary School  | 15,007  | 17,545   | 2,538      |
| PRIMARY | Hill Top CE Primary School             | 7,512   | 8,872  | 1,360      |
| PRIMARY | Home Farm Primary School               | 15,299  | 17,836   | 2,536      |
| PRIMARY | Hoyle Court Primary School             | 10,849  | 12,364   | 1,515      |
| PRIMARY | Idle CE Primary School                 | 15,050  | 17,438   | 2,388      |
| PRIMARY | Ingrow Primary School                  | 14,623  | 16,183   | 1,560      |
| PRIMARY | Keelham Primary School                 | 3,777   | 4,367  | 589        |
| PRIMARY | Keighley St Andrew's CE Primary School | 12,410  | 13,829   | 1,419      |
| PRIMARY | Killinghall Primary School             | 22,624  | 26,575   | 3,950      |
| PRIMARY | Knowleswood Primary School             | 14,324  | 17,127   | 2,804      |
| PRIMARY | Ley Top Primary School                 | 14,326  | 17,197   | 2,870      |
| PRIMARY | Lidget Green Primary School            | 20,468  | 23,068   | 2,601      |
| PRIMARY | Long Lee Primary School                | 13,802  | 14,855   | 1,053      |
| PRIMARY | Low Ash Primary School                 | 15,722  | 18,655   | 2,933      |
| PRIMARY | Low Moor CE Primary School             | 14,880  | 17,124   | 2,244      |
| PRIMARY | Menston Primary School                 | 14,172  | 16,400   | 2,228      |
| PRIMARY | Myrtle Park Primary School             | 7,362   | 8,903  | 1,541      |
| PRIMARY | Newby Primary School                   | 15,292  | 17,607   | 2,315      |
| PRIMARY | Newhall Park Primary School            | 14,658  | 16,626   | 1,967      |
| PRIMARY | Peel Park Primary School               | 21,340  | 23,582   | 2,242      |
| PRIMARY | Poplars Farm Primary School            | 11,815  | 14,756   | 2,941      |
| PRIMARY | Riddlesden St Mary's CE Primary        | 13,078  | 15,753   | 2,675      |
| PRIMARY | Russell Hall Primary School            | 7,396   | 8,860  | 1,464      |
| PRIMARY | Saltaire Primary School                | 14,683  | 17,541   | 2,858      |
| PRIMARY | Sandal Primary School and Nursery      | 14,735  | 17,272   | 2,537      |
| PRIMARY | Sandy Lane Primary School              | 11,074  | 13,272   | 2,199      |
| PRIMARY | Silsden Primary School                 | 21,905  | 25,000   | 3,095      |
| PRIMARY | St Luke's CE Primary School            | 7,428   | 9,047  | 1,619      |
| PRIMARY | St Mary's and St Peter's Catholic      | 7,076   | 8,740  | 1,664      |

positive = increase in cost

| Phase                           | School                               | 2022/23 Total De-Delegated Funds Contribution | 2023/24 Indicative Total De-Delegated Funds Contribution | Total Diff     |
|---------------------------------|--------------------------------------|---|--|----------------|
| PRIMARY                         | St Matthew's Catholic Primary School | 7,408   | 8,625  | 1,217          |
| PRIMARY                         | St Matthew's CE Primary School       | 14,815  | 16,022   | 1,207          |
| PRIMARY                         | St Paul's CE Primary School          | 7,286   | 8,766  | 1,480          |
| PRIMARY                         | St Stephen's CE Primary School       | 15,061  | 17,198   | 2,137          |
| PRIMARY                         | Stanbury Village School              | 3,614   | 4,296  | 682            |
| PRIMARY                         | Steeton Primary School               | 10,250  | 12,001   | 1,751          |
| PRIMARY                         | Stocks Lane Primary School           | 7,391   | 8,632  | 1,242          |
| PRIMARY                         | Swain House Primary School           | 15,779  | 18,315   | 2,535          |
| PRIMARY                         | Thackley Primary School              | 14,892  | 17,507   | 2,615          |
| PRIMARY                         | Trinity All Saints CE Primary School | 7,994   | 8,888  | 894            |
| PRIMARY                         | Wellington Primary School            | 15,274  | 18,072   | 2,797          |
| PRIMARY                         | Wibsey Primary School                | 23,267  | 26,829   | 3,562          |
| PRIMARY                         | Worthinghead Primary School          | 7,733   | 9,071  | 1,338          |
| <b>Total Maintained Primary</b> |                                      | <b>767,551</b>                                | <b>889,692</b>   | <b>122,141</b> |

| Phase                             | School                                   | 2022/23 Total De-Delegated Funds Contribution | 2023/24 Indicative Total De-Delegated Funds Contribution | Diff           |
|-----------------------------------|--|---|--|----------------|
| SECONDARY                         | Bingley Grammar School                   | 16,315  | 16,742   | 427            |
| SECONDARY                         | Parkside School                          | 11,062  | 11,143   | 80             |
| SECONDARY                         | St Bede's & St Joseph's Catholic College | 15,822  | 16,015   | 193            |
| SECONDARY                         | Titus Salt School                        | 13,657  | 13,845   | 188            |
| <b>Total Maintained Secondary</b> |  | <b>56,856</b>                                 | <b>57,745</b>  | <b>889</b>     |
| <b>Grand Total</b>                |  | <b>824,407</b>                                | <b>947,437</b>   | <b>123,030</b> |

This analysis shows the difference in cost for schools that remain maintained (at 1 January 2023) for access to the proposed set of de-delegated services.



## SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

Appendices 1a, 1b and 1c show the indicative values of allocations to be delegated to individual primary and secondary maintained schools and academies within the Schools Block. Appendix 1d provides an analysis of the change in cost of Schools Block formula funding following the use of the data collected in / based on the October 2022 Census. Appendices 2a, 2b and 2c show the proposed indicative rates of funding for early years settings for the 2022/23 financial year. Appendix 3 provides a more detailed analysis of how the High Needs Block planned budget has been constructed at individual setting level. Appendices 4 and 5 show the draft Primary and Secondary and Early Years pro-formas, which summarise the Authority's proposed formula funding arrangements. Appendix 6 provides more details of the additional place-led allocations to Special Schools, Special School Academies, PRUs and AP Academies, as directed by the DfE's change in DSG Grant Conditions that was announced on 16 December.

**Date(s) of any Previous Discussion at the Forum**

Indicative modelling for the Schools Block was most recently presented on 7 December.

**Background / Context**

The modelling presented for the Schools Block (Appendices 1 and 4) is calculated on the proposals that were set out for consultation and reported back to the Forum on 7 December (Document PC).

The modelling presented for the High Needs Block (Appendix 3) is calculated on the proposals that were set out for consultation and reported back to the Forum on 7 December (Document PE).

The modelling presented for the Early Years Block (Appendices 2 and 5) is calculated on the proposals that are set out to the Forum for consultation in Document PK and that will now be consulted on.

**Details of the Item for Consideration**

Primary & Secondary Schools Block Modelling

The modelling, shown in Appendices 1a, 1b and 1c, provides Members with an updated view of mainstream Primary and Secondary school and academy indicative formula funding allocation totals for 2023/24 now using confirmed pupil numbers and the dataset provided by the DfE taken from the October 2022 Census. This modelling is calculated using the same formula funding assumptions and proposals as those used to construct the modelling, which accompanied the consultation document in the autumn term.

Please note that the allocations in Appendices 1a, 1b and 1c exclude early years, high needs and post 16 funding i.e. these show Reception – Year 11 primary and secondary mainstream formula funding. They are also calculated on the Authority's financial year 1 April to 31 March. The main factors that will influence final allocations for 2023/24, and variances for individual schools and academies, not yet built into the modelling (because the data is not yet available), are:

- Final Pupil Premium allocations, which are to be confirmed by the DfE.
- New Growth Fund allocations, which will be based on October 2023 census numbers.
- Any allocations that come from our Falling Rolls Fund, where it is agreed that one should continue for the primary phase in 2023/24.

Change in the Cost of Schools Block Formula Funding October 2022 Census

Appendix 1d presents the changes in the cost of our funding formulae when the October 2022 Census dataset is used rather than the October 2021 Census dataset. This modelling does not show the differences in costs that come from changes in pupil numbers. It shows the impact of the year on year change in other data (FSM%, IDACI, EAL, prior attainment etc). The changes in cost affect the headroom that is available within the Schools Block and this can potentially affect what we can afford to deliver in terms of uplift for schools. This

### **Details of the Item for Consideration**

analysis also highlights data trends across the District, which are useful for the Forum to understand as these that will affect the allocations received by individual schools and academies.

#### **Early Years Single Funding Formula (EYSFF) – Hourly Rates**

Modelling, which shows the impact of the Authority's EYSFF proposals on rates of funding for 3&4 year olds, is presented in Appendices 2a, 2b and 2c. Due to data sensitivity, averages by type of provider are presented for the PVI sector. All early years providers should note that:

- Our Early Years Single Funding Formula proposals for 2023/24 are still to be consulted on. The consultation will close on 6 February.
- The Deprivation and SEND funding rates for 2023/24 for all early years providers are still indicative. The rolling 3-year average of Index of Multiple Deprivation information that is used to calculate these will be updated for the January 2023 Census when this is taken. Final Deprivation & SEND rates will be presented to providers in late February at the point the 1<sup>st</sup> draft indicative budgets are published.

#### **High Needs Planned Budget Modelling**

Appendix 3 is presented to give the Forum a deeper understanding of how the 2023/24 High Needs Block planned budget is constructed at individual setting level. We would stress however, that this appendix does not show the values of allocations that high needs providers will actually receive in 2023/24. These will be calculated on the occupancy of settings recorded on a monthly basis during the year. This appendix should be viewed alongside Document PL (DSG summary) and Document PP Appendix 1 (commissioned places).

Appendix 6 provides further explanation of the additional funding that will be allocated to special schools, special school academies, PRUs and alternative provision academies in the 2023/24 financial year, following the allocation by the DfE, within the 16 December announcement, of additional High Needs Block funding and the new Condition of DSG Grant that the DfE has established.

#### **Pro-Formas**

Appendix 4 gives the pro-forma, extracted from the ESFA's APT, which sets out our primary & secondary funding formula for 2023/24 as the Authority has proposed. If recommended by the Forum under agenda item 12, we will submit our APT to the ESFA on this basis.

Appendix 5 gives the pro-forma, extracted from our Section 251 Budget Statement, which sets out the proposed Early Years Single Funding Formula (EYSFF) for 2023/24. Our EYSFF pro-forma is still subject to the finalisation of our early years arrangements following our consultation with the early years sector. If agreed by Council, following this consultation, this pro-forma gives a summary of the formulae we will use to calculate EYSFF allocations in 2023/24.

#### **The Mainstream Schools Additional Grant (MSGA) 2023/24**

The DfE announced on 16 December 2022, for the 2023/24 financial year (from April 2023), a new Additional Grant for mainstream primary and secondary schools and academies, known as the MSAG. The summary details of how the Grant will be calculated and allocated are here:

<https://www.gov.uk/government/publications/mainstream-schools-additional-grant-2023-to-2024/mainstream-schools-additional-grant-2023-to-2024-methodology>

This Grant is funded from the additional £2bn into the national schools budget that the Chancellor announced on 17 November. It is a grant that will be allocated in addition to core formula funding allocations in 2023/24. The DfE has stated that this funding will be merged into the National Funding Formula in 2024/25, so will only exist as a separate grant for the 2023/24 financial year. The Grant is very similar in construction (in terms of the factors used – lump sum, base amount per pupil, FSM Ever6) to the Schools Supplementary Grant that was allocated in 2022/23. It is worth c. £17m to our schools and academies in total. However, the Grant is not extended to early years or to post-16.

Individual school and academy allocations will be published by the ESFA later this term.

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

This is an item for information. The implications for the DSG are set out in separate reports to this meeting (including Document PL).

### **Recommendations**

The Forum is asked to note the information provided. This will inform decisions and recommendations to be made under agenda item 12.

### **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
- Appendix 1d – Formula Funding Cost Change October 2022 Census
- Appendix 2a – EYSFF Maintained Nursery Schools
- Appendix 2b – EYSFF Nursery Classes
- Appendix 2c – EYSFF PVI Providers
- Appendix 3 – Breakdown of the High Needs Block planned budget at individual provider level
- Appendix 4 – Primary & Secondary Pro-forma
- Appendix 5 – EYSFF Pro-Forma
- Appendix 6 – Additional Special and PRU / AP Funding 2023/24

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|                     |  | 2022/23 Actuals  |                          |                           |  |                      | 2023/24 Estimated - see notes below                    |                           |                         |                     |                         | Variances                             |                                    |                     |                 | MFG   | Core Formula Funding |              |               |                         |                                    |
|---------------------|--|--|--------------------------|---------------------------|--|----------------------|--|---------------------------|-------------------------|---------------------|-------------------------|---------------------------------------|------------------------------------|---------------------|-----------------|---|----------------------|--------------|---------------|-------------------------|------------------------------------|
| Phase               | School                                   | Formula Funding (excluding rates, PFI and Split Sites) | School Supplement        | Growth Fund / Safeguarded | Pupil Premium Grant (latest published) | Total 2022/23 Actual | Formula Funding (excluding rates, PFI and Split Sites) | Growth Fund / Safeguarded | ESTIMATED Premium Grant | 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) |
|                     |  | PRIMARY  | Addingham Primary School | 883,057                   | 24,103                                 | 58,108               | 9,550  | 974,818                   | 850,531                 | 73,953              | 12,555                  | 937,040                               | -56,629                            | 15,845              | 3,005           | -37,779                                       | 9,176                | 4,382        | 4,453         | 71                      | -16                                |
| RECOUPMENT ACADEMY  | All Saints' CE Primary School (Bradford) | 3,038,379  | 87,743                   | 0                         | 363,563                                | 3,489,684            | 3,073,304  | 0                         | 369,570                 | 3,442,874           | -52,818                 | 0                                     | 6,008                              | -46,810             | 0               | 4,939   | 5,063                | 125          | -26           | 607                     |                                    |
| PRIMARY             | All Saints' CE Primary School (Ilkley)   | 1,505,545  | 39,032                   | 19,520                    | 20,735                                 | 1,584,832            | 1,546,155  | 3,168                     | 21,780                  | 1,571,103           | 1,578                   | -16,351                               | 1,045                              | -13,729             | 0               | 4,376   | 4,405                | 29           | -2            | 351                     |                                    |
| RECOUPMENT ACADEMY  | Beckfoot Allerton Primary Academy        | 1,801,201  | 50,780                   | 0                         | 139,885                                | 1,991,865            | 1,915,821  | 0                         | 145,500                 | 2,061,321           | 63,840                  | 0                                     | 5,615                              | 69,455              | 0               | 4,689   | 4,938                | 249          | -7            | 388                     |                                    |
| PRIMARY             | Ashlands Primary School                  | 1,473,341  | 39,531                   | 0                         | 48,420                                 | 1,561,293            | 1,451,217  | 0                         | 51,935                  | 1,503,152           | -61,656                 | 0                                     | 3,515                              | -58,141             | 6,377           | 4,385   | 4,424                | 39           | -17           | 328                     |                                    |
| RECOUPMENT ACADEMY  | Atlas School                             | 1,007,999  | 27,225                   | 0                         | 81,355                                 | 1,116,580            | 988,255  | 0                         | 77,115                  | 1,065,370           | -46,970                 | 0                                     | -4,240                             | -51,210             | 0               | 5,364   | 5,615                | 251          | -17           | 176                     |                                    |
| RECOUPMENT ACADEMY  | Baildon CE Primary School                | 1,778,505  | 46,346                   | 0                         | 44,905                                 | 1,869,756            | 1,819,265  | 0                         | 44,970                  | 1,864,235           | -5,586                  | 0                                     | 65                                 | -5,521              | 0               | 4,376   | 4,405                | 29           | -4            | 413                     |                                    |
| PRIMARY             | Bankfoot Primary School                  | 1,060,642  | 28,256                   | 0                         | 70,220                                 | 1,159,117            | 1,098,235  | 0                         | 68,700                  | 1,166,935           | 9,338                   | 0                                     | -1,520                             | 7,818               | 4,971           | 5,112   | 5,132                | 20           | 1             | 214                     |                                    |
| RECOUPMENT ACADEMY  | Barkerend Primary Leadership Academy     | 2,442,621  | 66,739                   | 0                         | 233,705                                | 2,743,064            | 2,637,330  | 0                         | 252,790                 | 2,890,120           | 127,970                 | 0                                     | 19,085                             | 147,055             | 0               | 4,979   | 5,101                | 122          | 13            | 517                     |                                    |
| PRIMARY             | Ben Rhydding Primary School              | 827,410  | 23,522                   | 2,048                     | 23,850                                 | 876,829              | 832,076  | 2,048                     | 25,050                  | 859,174             | -18,855                 | 0                                     | 1,200                              | -17,655             | 2,910           | 4,386   | 4,426                | 40           | -6            | 188                     |                                    |
| PRIMARY             | Blakehill Primary School                 | 1,761,445  | 48,167                   | 5,500                     | 99,170                                 | 1,914,282            | 1,842,692  | 5,500                     | 108,145                 | 1,956,337           | 33,079                  | 0                                     | 8,975                              | 42,054              | 5,807           | 4,382   | 4,419                | 37           | 4             | 417                     |                                    |
| RECOUPMENT ACADEMY  | Bowling Park Primary School              | 3,098,583  | 88,072                   | 0                         | 403,340                                | 3,589,995            | 3,245,182  | 0                         | 416,445                 | 3,661,627           | 58,527                  | 0                                     | 13,105                             | 71,632              | 0               | 5,190   | 5,373                | 183          | -10           | 604                     |                                    |
| PRIMARY             | Brackenhill Primary School               | 1,887,370  | 50,989                   | 0                         | 149,580                                | 2,087,939            | 1,966,024  | 0                         | 158,595                 | 2,124,619           | 27,664                  | 0                                     | 9,015                              | 36,679              | 28,824          | 4,945   | 4,977                | 32           | 3             | 395                     |                                    |
| PRIMARY             | Burley & Woodhead CE Primary School      | 874,325  | 23,909                   | 0                         | 13,410                                 | 911,644              | 886,981  | 0                         | 14,080                  | 901,061             | -11,253                 | 0                                     | 670                                | -10,583             | 1,576           | 4,382   | 4,413                | 31           | -4            | 201                     |                                    |
| PRIMARY             | Burley Oaks Primary School               | 1,744,385  | 45,060                   | 0                         | 27,700                                 | 1,817,145            | 1,775,215  | 0                         | 29,100                  | 1,804,315           | -14,230                 | 0                                     | 1,400                              | -12,830             | 0               | 4,375   | 4,405                | 30           | -6            | 403                     |                                    |
| RECOUPMENT ACADEMY  | Byron Primary Academy                    | 2,869,364  | 79,134                   | 0                         | 260,380                                | 3,208,878            | 3,071,990  | 0                         | 280,055                 | 3,352,045           | 123,492                 | 0                                     | 19,675                             | 143,167             | 0               | 4,810   | 4,995                | 185          | 2             | 615                     |                                    |
| PRIMARY             | Carrwood Primary School                  | 1,636,968  | 47,628                   | 0                         | 258,890                                | 1,943,516            | 1,514,392  | 0                         | 241,080                 | 1,755,472           | -170,234                | 0                                     | -17,810                            | -188,044            | 39,760          | 5,809   | 5,893                | 84           | -33           | 257                     |                                    |
| PRIMARY             | Cavendish Primary School                 | 2,017,572  | 61,327                   | 0                         | 281,115                                | 2,360,013            | 2,138,769  | 0                         | 295,655                 | 2,434,424           | 59,870                  | 0                                     | 14,540                             | 74,410              | 0               | 4,997   | 5,166                | 169          | -2            | 414                     |                                    |
| RECOUPMENT ACADEMY  | Christ Church Primary Academy            | 944,866  | 28,638                   | 0                         | 137,060                                | 1,110,563            | 987,852  | 0                         | 145,435                 | 1,133,287           | 14,349                  | 0                                     | 8,375                              | 22,724              | 0               | 5,595   | 5,645                | 50           | 1             | 175                     |                                    |
| RECOUPMENT ACADEMY  | Clayton St John's CE Primary Academy     | 1,672,695  | 50,033                   | 0                         | 177,145                                | 1,899,873            | 1,734,280  | 0                         | 185,705                 | 1,919,985           | 11,552                  | 0                                     | 8,560                              | 20,112              | 0               | 4,656   | 4,765                | 108          | -6            | 364                     |                                    |
| RECOUPMENT ACADEMY  | Clayton Village Primary School           | 1,027,515  | 27,260                   | 0                         | 59,860                                 | 1,114,635            | 1,045,975  | 0                         | 61,425                  | 1,107,400           | -8,800                  | 0                                     | 1,565                              | -7,235              | 46,180          | 5,071   | 5,102                | 31           | -3            | 205                     |                                    |
| RECOUPMENT ACADEMY  | Copthorne Primary Academy                | 2,055,935  | 53,596                   | 0                         | 142,295                                | 2,251,825            | 2,131,269  | 0                         | 148,030                 | 2,279,299           | 21,738                  | 0                                     | 5,735                              | 27,473              | 0               | 4,952   | 5,062                | 110          | -5            | 421                     |                                    |
| RECOUPMENT ACADEMY  | Cottingley Village Primary School        | 1,769,975  | 49,383                   | 0                         | 112,713                                | 1,932,070            | 1,832,480  | 0                         | 111,525                 | 1,944,005           | 13,122                  | 0                                     | -1,188                             | 11,935              | 0               | 4,384   | 4,405                | 21           | 1             | 416                     |                                    |
| PRIMARY             | Crossflatts Primary School               | 1,808,360  | 49,576                   | 0                         | 94,390                                 | 1,952,326            | 1,885,540  | 0                         | 100,600                 | 1,985,940           | 27,404                  | 0                                     | 6,210                              | 33,614              | 0               | 4,382   | 4,405                | 23           | 4             | 428                     |                                    |
| RECOUPMENT ACADEMY  | Crossley Hall Primary School             | 2,908,178  | 80,936                   | 0                         | 284,618                                | 3,273,731            | 2,988,657  | 0                         | 292,455                 | 3,281,112           | -457                    | 0                                     | 7,838                              | 7,380               | 0               | 4,876   | 5,006                | 130          | -16           | 597                     |                                    |
| RECOUPMENT ACADEMY  | Cullingworth Village Primary Academy     | 1,356,270  | 37,932                   | 0                         | 71,100                                 | 1,465,302            | 1,405,195  | 0                         | 82,265                  | 1,487,460           | 10,993                  | 0                                     | 11,165                             | 22,158              | 0               | 4,384   | 4,405                | 21           | 1             | 319                     |                                    |
| RECOUPMENT ACADEMY  | Denholme Primary Academy                 | 895,690  | 26,522                   | 0                         | 79,505                                 | 1,001,717            | 923,995  | 0                         | 83,920                  | 1,007,915           | 1,783                   | 0                                     | 4,415                              | 6,198               | 0               | 4,879   | 4,941                | 62           | -2            | 187                     |                                    |
| RECOUPMENT ACADEMY  | Dixons Marchbank Academy                 | 2,089,629  | 52,916                   | 0                         | 137,808                                | 2,280,353            | 2,152,618  | 0                         | 145,500                 | 2,298,118           | 10,073                  | 0                                     | 7,693                              | 17,765              | 164,382         | 5,113   | 5,138                | 24           | 0             | 419                     |                                    |
| RECOUPMENT FREE SCH | Dixons Music Primary                     | 1,841,652  | 49,019                   | 0                         | 98,945                                 | 1,989,616            | 1,929,509  | 0                         | 100,330                 | 2,029,839           | 38,838                  | 0                                     | 1,385                              | 40,223              | 70,992          | 4,578   | 4,594                | 16           | 7             | 420                     |                                    |
| RECOUPMENT ACADEMY  | East Morton CE Primary Academy           | 870,884  | 24,717                   | 0                         | 24,210                                 | 919,841              | 925,050  | 0                         | 22,900                  | 947,950             | 29,419                  | 0                                     | -1,310                             | 28,109              | 0               | 4,390   | 4,405                | 15           | 6             | 210                     |                                    |
| PRIMARY             | Eastburn Junior and Infant School        | 903,485  | 26,106                   | 0                         | 31,855                                 | 961,446              | 914,509  | 0                         | 32,010                  | 946,519             | -15,082                 | 0                                     | 155                                | -14,927             | 1,605           | 4,406   | 4,439                | 34           | -5            | 206                     |                                    |
| RECOUPMENT ACADEMY  | Eastwood Primary Academy                 | 1,850,343  | 51,609                   | 0                         | 162,045                                | 2,063,997            | 1,903,062  | 0                         | 165,870                 | 2,068,932           | 1,111                   | 0                                     | 3,825                              | 4,936               | 0               | 4,902   | 5,035                | 133          | -10           | 378                     |                                    |
| PRIMARY             | Eldwick Primary School                   | 2,230,595  | 56,375                   | 0                         | 48,725                                 | 2,335,695            | 2,237,740  | 0                         | 54,780                  | 2,292,520           | -49,230                 | 0                                     | 6,055                              | -43,175             | 0               | 4,373   | 4,405                | 32           | -15           | 508                     |                                    |
| PRIMARY             | Fagley Primary School                    | 1,151,378  | 32,931                   | 0                         | 142,295                                | 1,326,605            | 1,211,503  | 0                         | 150,940                 | 1,362,443           | 27,193                  | 0                                     | 8,645                              | 35,838              | 0               | 5,560   | 5,609                | 49           | 3             | 216                     |                                    |
| PRIMARY             | Farfield Primary                         | 1,975,430  | 60,623                   | 0                         | 298,735                                | 2,334,789            | 2,105,919  | 0                         | 327,285                 | 2,433,204           | 69,865                  | 0                                     | 28,550                             | 98,415              | 0               | 5,234   | 5,305                | 71           | 8             | 397                     |                                    |
| RECOUPMENT ACADEMY  | Farnham Primary Academy                  | 2,005,114  | 52,573                   | 0                         | 137,115                                | 2,194,801            | 2,117,868  | 0                         | 144,045                 | 2,261,913           | 60,182                  | 0                                     | 6,930                              | 67,112              | 0               | 4,923   | 5,091                | 168          | -2            | 416                     |                                    |
| RECOUPMENT ACADEMY  | Fearnville Primary Academy               | 1,714,441  | 50,271                   | 0                         | 254,840                                | 2,019,552            | 1,885,599  | 0                         | 280,815                 | 2,166,414           | 120,887                 | 0                                     | 25,975                             | 146,862             | 0               | 5,532   | 5,646                | 113          | 15            | 334                     |                                    |
| RECOUPMENT ACADEMY  | Feversham Primary Academy                | 1,943,337  | 52,522                   | 0                         | 167,890                                | 2,163,749            | 2,064,102  | 0                         | 173,145                 | 2,237,247           | 68,243                  | 0                                     | 5,255                              | 73,498              | 0               | 4,953   | 5,034                | 82           | 7             | 410                     |                                    |
| PRIMARY             | Foxhill Primary School                   | 891,386  | 25,621                   | 0                         | 43,545                                 | 960,552              | 936,349  | 0                         | 45,735                  | 982,084             | 19,342                  | 0                                     | 2,190                              | 21,532              | 11,299          | 4,451   | 4,459                | 7            | 4             | 210                     |                                    |
| PRIMARY             | Frizinghall Primary School               | 1,776,050  | 49,558                   | 0                         | 145,425                                | 1,971,032            | 1,821,451  | 0                         | 149,865                 | 1,971,316           | -4,156                  | 0                                     | 4,440                              | 284                 | 0               | 4,804   | 4,883                | 79           | -7            | 373                     |                                    |
| PRIMARY             | Girlington Primary School                | 2,008,569  | 55,844                   | 0                         | 188,360                                | 2,252,773            | 2,162,135  | 0                         | 197,880                 | 2,360,015           | 97,722                  | 0                                     | 9,520                              | 107,242             | 0               | 4,974   | 5,197                | 223          | 1             | 416                     |                                    |
| RECOUPMENT ACADEMY  | Glenaire Primary School                  | 876,805  | 26,634                   | 0                         | 111,105                                | 1,014,544            | 898,686  | 0                         | 112,350                 | 1,011,036           | -4,753                  | 0                                     | 1,245                              | -3,508              | 0               | 5,314   | 5,480                | 165          | -6            | 164                     |                                    |
| RECOUPMENT ACADEMY  | Green Lane Primary School                | 2,653,925  | 71,526                   | 0                         | 254,840                                | 2,980,291            | 2,762,326  | 0                         | 263,355                 | 3,025,681           | 36,875                  | 0                                     | 8,515                              | 45,390              | 0               | 5,047   | 5,242                | 194          | -13           | 527                     |                                    |
| RECOUPMENT ACADEMY  | Greengates Primary School                | 956,383  | 28,501                   | 0                         | 97,255                                 | 1,082,139            | 1,041,887  | 0                         | 96,030                  | 1,137,917           | 57,003                  | 0                                     | -1,225                             | 55,778              | 0               | 4,974   | 5,158                | 184          | 4             | 202                     |                                    |
| RECOUPMENT ACADEMY  | Grove House Primary School               | 1,783,292  | 52,132                   | 0                         | 164,815                                | 2,000,240            | 1,835,422  | 0                         | 170,235                 | 2,005,657           | -2                      | 0                                     | 5,420                              | 5,418               | 0               | 4,647   | 4,743                | 96           | -8            | 387                     |                                    |
| RECOUPMENT ACADEMY  | Harden Primary Academy                   | 904,180  | 26,033                   | 0                         | 36,980                                 | 967,193              | 911,407  | 0                         | 32,325                  | 943,732             | -18,806                 | 0                                     | -4,655                             | -23,461             | 3,977           | 4,388   | 4,424                | 37           | -6            | 206                     |                                    |
| RECOUPMENT ACADEMY  | Haworth Primary Academy                  | 1,244,347  | 55,040                   | 0                         | 55,040                                 | 1,334,615            | 1,257,493  | 0                         | 53,835                  | 1,311,328           | -22,081                 | 0                                     | -1,205                             | -23,286             | 6,473           | 4,397   | 4,428                | 31           | -7            | 284                     |                                    |
| RECOUPMENT ACADEMY  | Beckfoot Heaton Primary Academy          | 2,947,301  | 83,576                   | 0                         | 312,235                                | 3,343,112            | 3,090,509  | 0                         | 322,945                 | 3,413,454           | 59,632                  | 0                                     | 10,710                             | 70,342              | 0               | 4,819   | 4,913                | 95           | 0             | 629                     |                                    |
| PRIMARY             | Heaton St Barnabas' CE Primary School    | 1,894,612  | 51,848                   | 0                         | 135,315                                | 2,081,776            | 1,955,553  | 0                         | 142,145                 | 2,097,698           | 9,092                   | 0                                     | 6,830                              | 15,922              | 127,478         | 4,690   | 4,712                | 22           | 0             | 415                     |                                    |
| RECOUPMENT ACADEMY  | High Crag Primary Leadership Academy     | 1,652,986  | 51,664                   | 0                         | 249,245                                | 1,953,895            | 1,752,562  | 0                         | 268,730                 | 2,021,292           | 47,913                  | 0                                     | 19,485                             | 67,398              | 0               | 4,970   | 5,036                | 66           | 5             | 348                     |                                    |
| PRIMARY             | Hill Top CE Primary School               | 953,731  | 27,685                   |                           |  |                      |  |                           |                         |                     |                         |                                       |                                    |                     |                 |   |                      |              |               |                         |                                    |

|                     |   | 2022/23 Actuals  |                             |                          |  | 2023/24 Estimated - see notes below |  |                          |                               | Variances               |                                       |                                    |                     | MFG             | Core Formula Funding                          |              |              |               | 2023/24                 |                                    |
|---------------------|---|--|-----------------------------|--------------------------|--|-------------------------------------|--|--------------------------|-------------------------------|-------------------------|---------------------------------------|------------------------------------|---------------------|-----------------|---|--------------|--------------|---------------|-------------------------|------------------------------------|
| Phase               | School  | Formula Funding (excluding rates, PFI and Split Sites) | School Supplement ary Grant | Growth Fund / d Salaries | Pupil Premium Grant (latest published) | Total 2022/23 Actual                | Formula Funding (excluding rates, PFI and Split Sites) | Growth Fund / 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 | 2023/24 Funded No.s (October 2022) |
| RECOUPMENT ACADEMY  | Merlin Top Primary Academy                        | 1,603,514  | 48,731                      | 0                        | 242,375                                | 1,894,620                           | 1,734,690  | 0                        | 274,170                       | 2,008,860               | 82,446                                | 0                                  | 31,795              | 114,241         | 0   | 5,435        | 5,596        | 161           | 6                       | 310                                |
| RECOUPMENT ACADEMY  | Miriam Lord Community Primary School              | 1,611,402  | 44,355                      | 0                        | 141,230                                | 1,796,987                           | 1,886,330  | 0                        | 158,595                       | 2,044,925               | 230,572                               | 0                                  | 17,365              | 247,937         | 0   | 5,033        | 5,284        | 251           | 28                      | 357                                |
| PRIMARY             | Myrtle Park Primary School                        | 885,706  | 25,888                      | 0                        | 33,560                                 | 945,154                             | 944,282  | 0                        | 36,710                        | 980,992                 | 32,688                                | 0                                  | 3,150               | 35,838          | 0   | 4,404        | 4,433        | 29            | 6                       | 213                                |
| RECOUPMENT ACADEMY  | Beckfoot Nessfield Primary Academy                | 1,366,328  | 39,299                      | 0                        | 92,715                                 | 1,498,343                           | 1,298,764  | 0                        | 91,195                        | 1,389,959               | -106,864                              | 0                                  | -1,520              | -108,384        | 0   | 4,520        | 4,638        | 119           | -31                     | 280                                |
| PRIMARY             | Newby Primary School                              | 1,940,582  | 55,188                      | 0                        | 180,050                                | 2,175,820                           | 2,026,066  | 0                        | 186,240                       | 2,212,306               | 30,296                                | 0                                  | 6,190               | 36,486          | 0   | 4,786        | 4,930        | 144           | -6                      | 411                                |
| PRIMARY             | Newhall Park Primary School                       | 1,847,945  | 54,183                      | 0                        | 197,640                                | 2,099,768                           | 1,908,404  | 0                        | 201,800                       | 2,110,204               | 6,277                                 | 0                                  | 4,160               | 10,437          | 0   | 4,791        | 4,957        | 166           | -12                     | 385                                |
| RECOUPMENT ACADEMY  | Oakworth Primary Academy                          | 1,761,445  | 46,975                      | 0                        | 67,730                                 | 1,876,150                           | 1,738,940  | 0                        | 63,505                        | 1,802,445               | -69,480                               | 0                                  | -4,225              | -73,705         | 7,775   | 4,379        | 4,425        | 46            | -20                     | 393                                |
| RECOUPMENT ACADEMY  | Oldfield Primary School                           | 402,577  | 10,152                      | 0                        | 19,350                                 | 432,079                             | 393,714  | 0                        | 18,870                        | 412,584                 | -19,014                               | 0                                  | -480                | -19,494         | 48,076  | 7,241        | 7,571        | 331           | -5                      | 52                                 |
| RECOUPMENT ACADEMY  | Our Lady & St Brendan's Catholic Primary School   | 991,388  | 27,408                      | 0                        | 84,485                                 | 1,103,282                           | 1,087,769  | 0                        | 89,090                        | 1,176,859               | 68,972                                | 0                                  | 4,605               | 73,577          | 0   | 5,306        | 5,636        | 330           | 1                       | 193                                |
| RECOUPMENT ACADEMY  | Our Lady of Victories Catholic Primary Academy    | 1,042,101  | 27,284                      | 0                        | 54,615                                 | 1,124,000                           | 1,106,296  | 0                        | 58,490                        | 1,164,786               | 36,911                                | 0                                  | 3,875               | 40,786          | 0   | 5,092        | 5,194        | 102           | 3                       | 213                                |
| RECOUPMENT ACADEMY  | Oxenhope CE Primary Academy                       | 872,273  | 25,245                      | 0                        | 40,430                                 | 937,948                             | 901,126  | 0                        | 45,330                        | 946,456                 | 3,608                                 | 0                                  | 4,900               | 8,508           | 0   | 4,421        | 4,528        | 107           | -4                      | 199                                |
| RECOUPMENT ACADEMY  | The Co-op Academy Parkland                        | 1,167,759  | 35,096                      | 0                        | 174,405                                | 1,377,260                           | 1,131,799  | 0                        | 171,980                       | 1,303,779               | -71,056                               | 0                                  | -2,425              | -73,481         | 11,483  | 5,647        | 5,745        | 98            | -16                     | 197                                |
| RECOUPMENT ACADEMY  | Parkwood Primary School                           | 1,061,734  | 28,382                      | 0                        | 112,185                                | 1,202,301                           | 1,180,399  | 0                        | 128,040                       | 1,308,439               | 90,283                                | 0                                  | 15,855              | 106,138         | 72,429  | 6,023        | 5,992        | -31           | 16                      | 197                                |
| PRIMARY             | Peel Park Primary School                          | 2,731,880  | 78,145                      | 0                        | 302,595                                | 3,112,621                           | 2,695,857  | 0                        | 296,820                       | 2,992,677               | -114,168                              | 0                                  | -5,775              | -119,943        | 0   | 4,887        | 4,956        | 69            | -31                     | 544                                |
| PRIMARY             | Poplars Farm Primary School                       | 1,508,807  | 42,533                      | 45,045                   | 123,265                                | 1,719,650                           | 1,685,662  | 45,939                   | 140,755                       | 1,872,356               | 134,322                               | 894                                | 17,490              | 152,707         | 0   | 4,788        | 4,886        | 98            | 21                      | 345                                |
| RECOUPMENT ACADEMY  | Beckfoot Priestthorpe Primary School              | 866,528  | 24,980                      | 0                        | 48,475                                 | 939,983                             | 895,325  | 0                        | 50,925                        | 946,250                 | 3,817                                 | 0                                  | 2,450               | 6,267           | 18,640  | 4,742        | 4,762        | 20            | 0                       | 188                                |
| RECOUPMENT ACADEMY  | The Co-op Academy Princeville                     | 2,046,050  | 56,269                      | 0                        | 192,515                                | 2,294,834                           | 2,000,919  | 0                        | 187,695                       | 2,188,614               | -101,400                              | 0                                  | -4,820              | -106,220        | 0   | 5,066        | 5,211        | 145           | -31                     | 384                                |
| RECOUPMENT FREE SCH | Rainbow Primary Leadership Academy                | 1,513,914  | 39,675                      | 0                        | 123,265                                | 1,676,854                           | 1,644,414  | 0                        | 136,770                       | 1,781,184               | 90,825                                | 0                                  | 13,505              | 104,330         | 48,893  | 5,321        | 5,339        | 18            | 16                      | 308                                |
| RECOUPMENT ACADEMY  | Reevy Hill Primary School                         | 1,133,634  | 35,216                      | 0                        | 103,125                                | 1,361,974                           | 1,184,584  | 0                        | 202,875                       | 1,387,459               | 15,735                                | 0                                  | 9,750               | 25,485          | 0   | 5,702        | 5,778        | 77            | 0                       | 205                                |
| PRIMARY             | Riddlesden St Mary's CE Primary                   | 1,624,998  | 46,755                      | 0                        | 131,575                                | 1,803,328                           | 1,760,717  | 0                        | 141,135                       | 1,901,852               | 88,964                                | 0                                  | 9,560               | 98,524          | 0   | 4,657        | 4,785        | 128           | 9                       | 368                                |
| PRIMARY             | Russell Hall Primary School                       | 931,029  | 27,637                      | 0                        | 70,235                                 | 1,028,902                           | 979,189  | 0                        | 87,885                        | 1,067,074               | 20,522                                | 0                                  | 17,650              | 38,172          | 822   | 4,699        | 4,708        | 8             | 4                       | 208                                |
| RECOUPMENT ACADEMY  | Ryecroft Primary Academy                          | 1,192,797  | 33,260                      | 0                        | 152,350                                | 1,378,407                           | 1,199,249  | 0                        | 155,685                       | 1,354,934               | -26,808                               | 0                                  | 3,335               | -23,473         | 81,678  | 5,981        | 6,026        | 46            | -6                      | 199                                |
| PRIMARY             | Saltaire Primary School                           | 1,757,180  | 48,327                      | 0                        | 104,030                                | 1,909,537                           | 1,841,290  | 0                        | 118,645                       | 1,959,935               | 35,783                                | 0                                  | 14,615              | 50,398          | 0   | 4,382        | 4,405        | 23            | 6                       | 418                                |
| PRIMARY             | Sandal Primary School and Nursery                 | 1,769,975  | 47,853                      | 0                        | 77,000                                 | 1,894,828                           | 1,823,670  | 0                        | 79,870                        | 1,903,540               | 5,842                                 | 0                                  | 2,870               | 8,712           | 0   | 4,380        | 4,405        | 25            | -1                      | 414                                |
| PRIMARY             | Sandy Lane Primary School                         | 1,376,527  | 40,144                      | 0                        | 120,800                                | 1,537,472                           | 1,487,638  | 0                        | 137,400                       | 1,625,038               | 70,966                                | 0                                  | 16,600              | 87,566          | 0   | 4,660        | 4,768        | 108           | 8                       | 312                                |
| RECOUPMENT ACADEMY  | Shibden Head Primary Academy                      | 1,714,530  | 47,697                      | 0                        | 88,865                                 | 1,851,092                           | 1,784,025  | 0                        | 91,485                        | 1,875,510               | 21,798                                | 0                                  | 2,620               | 24,418          | 0   | 4,384        | 4,405        | 21            | 3                       | 405                                |
| RECOUPMENT ACADEMY  | Shipley CE Primary Academy                        | 929,830  | 27,274                      | 0                        | 72,020                                 | 1,029,124                           | 897,155  | 0                        | 69,840                        | 966,995                 | -59,949                               | 0                                  | -2,180              | -62,129         | 9,278   | 4,908        | 4,984        | 76            | -15                     | 180                                |
| RECOUPMENT ACADEMY  | Shirley Manor Primary Academy                     | 1,004,409  | 30,071                      | 0                        | 130,815                                | 1,165,295                           | 1,029,269  | 0                        | 133,435                       | 1,162,704               | -5,211                                | 0                                  | 2,620               | -2,591          | 8,489   | 5,473        | 5,564        | 90            | -4                      | 185                                |
| PRIMARY             | Silsden Primary School                            | 2,610,180  | 71,385                      | 0                        | 152,135                                | 2,833,700                           | 2,623,047  | 0                        | 155,440                       | 2,778,487               | -58,519                               | 0                                  | 3,305               | -55,214         | 2,072   | 4,382        | 4,408        | 27            | -17                     | 595                                |
| RECOUPMENT ACADEMY  | Southmere Primary Academy                         | 1,799,787  | 50,844                      | 0                        | 242,375                                | 2,093,005                           | 1,900,806  | 0                        | 257,535                       | 2,158,341               | 50,176                                | 0                                  | 15,160              | 65,336          | 0   | 5,508        | 5,691        | 183           | -2                      | 334                                |
| RECOUPMENT ACADEMY  | Dixons Manningham Primary Academy                 | 1,901,435  | 52,277                      | 0                        | 186,975                                | 2,140,688                           | 2,098,377  | 0                        | 205,155                       | 2,303,532               | 144,664                               | 0                                  | 18,180              | 162,844         | 0   | 5,088        | 5,259        | 171           | 15                      | 399                                |
| RECOUPMENT ACADEMY  | St Anne's Catholic Primary Academy                | 1,011,040  | 26,738                      | 0                        | 48,475                                 | 1,086,253                           | 1,097,879  | 0                        | 52,380                        | 1,150,259               | 60,102                                | 0                                  | 3,905               | 64,007          | 0   | 5,013        | 5,203        | 190           | 4                       | 211                                |
| RECOUPMENT ACADEMY  | St Anthony's Catholic Primary School (Clayton)    | 953,744  | 26,532                      | 0                        | 49,860                                 | 1,030,137                           | 1,001,021  | 0                        | 54,910                        | 1,055,931               | 20,744                                | 0                                  | 5,050               | 25,794          | 0   | 4,805        | 4,883        | 78            | 1                       | 205                                |
| RECOUPMENT ACADEMY  | St Anthony's Catholic Primary School (Shipley)    | 651,272  | 18,176                      | 0                        | 44,985                                 | 714,433                             | 672,155  | 0                        | 44,725                        | 716,880                 | 2,707                                 | 0                                  | -260                | 2,447           | 17,064  | 5,399        | 5,421        | 22            | 0                       | 124                                |
| RECOUPMENT ACADEMY  | St Clare's Catholic Primary School                | 1,072,732  | 30,649                      | 0                        | 112,185                                | 1,215,566                           | 1,135,678  | 0                        | 117,855                       | 1,253,533               | 32,298                                | 0                                  | 5,670               | 37,968          | 0   | 5,330        | 5,486        | 156           | 0                       | 207                                |
| RECOUPMENT ACADEMY  | St Columba's Catholic Primary School              | 1,620,191  | 46,553                      | 0                        | 173,125                                | 1,839,869                           | 1,740,572  | 0                        | 185,860                       | 1,926,432               | 73,828                                | 0                                  | 12,735              | 86,563          | 0   | 5,082        | 5,259        | 177           | 3                       | 331                                |
| RECOUPMENT ACADEMY  | St Cuthbert & the First Martyrs' Catholic Primary | 1,007,886  | 27,277                      | 0                        | 59,155                                 | 1,094,318                           | 1,068,664  | 0                        | 59,275                        | 1,127,939               | 33,501                                | 0                                  | 120                 | 33,621          | 0   | 4,953        | 5,089        | 136           | 1                       | 210                                |
| RECOUPMENT ACADEMY  | St Francis' Catholic Primary School               | 919,988  | 25,075                      | 0                        | 30,110                                 | 975,173                             | 990,483  | 0                        | 35,950                        | 1,026,433               | 45,420                                | 0                                  | 5,840               | 51,260          | 0   | 4,655        | 4,717        | 61            | 7                       | 210                                |
| RECOUPMENT ACADEMY  | St James Primary Academy                          | 1,329,371  | 38,980                      | 0                        | 175,535                                | 1,543,885                           | 1,411,620  | 0                        | 187,315                       | 1,598,935               | 43,269                                | 0                                  | 11,780              | 55,049          | 0   | 5,387        | 5,493        | 105           | 3                       | 257                                |
| RECOUPMENT ACADEMY  | St John The Evangelist Catholic Primary           | 914,235  | 26,569                      | 0                        | 67,770                                 | 1,008,574                           | 968,473  | 0                        | 75,910                        | 1,044,383               | 27,669                                | 0                                  | 8,140               | 35,809          | 0   | 4,704        | 4,818        | 114           | 1                       | 201                                |
| RECOUPMENT ACADEMY  | St John's CE Primary School                       | 1,911,111  | 53,680                      | 0                        | 157,450                                | 2,122,241                           | 1,933,535  | 0                        | 161,035                       | 2,094,570               | -31,256                               | 0                                  | 3,585               | -27,671         | 0   | 4,700        | 4,762        | 62            | -12                     | 406                                |
| RECOUPMENT ACADEMY  | St Joseph's Catholic Primary School (Bingley)     | 856,824  | 24,687                      | 0                        | 33,545                                 | 915,056                             | 852,647  | 0                        | 33,780                        | 886,427                 | -28,864                               | 0                                  | 235                 | -28,629         | 0   | 4,430        | 4,535        | 106           | -11                     | 188                                |
| RECOUPMENT ACADEMY  | St Joseph's Catholic Primary School (Bradford)    | 1,574,087  | 44,592                      | 0                        | 184,205                                | 1,802,884                           | 1,655,700  | 0                        | 197,880                       | 1,853,580               | 37,021                                | 0                                  | 13,675              | 50,696          | 5,915   | 5,273        | 5,341        | 68            | 3                       | 310                                |
| RECOUPMENT ACADEMY  | St Joseph's Catholic Primary, Keighley            | 1,323,726  | 37,087                      | 39,642                   | 105,525                                | 1,505,979                           | 1,444,830  | 40,922                   | 111,610                       | 1,597,362               | 84,018                                | 1,280                              | 6,085               | 91,383          | 0   | 4,809        | 4,816        | 8             | 17                      | 300                                |
| PRIMARY             | St Luke's CE Primary School                       | 982,673  | 27,914                      | 0                        | 74,790                                 | 1,085,377                           | 1,083,181  | 0                        | 84,010                        | 1,167,191               | 72,595                                | 0                                  | 9,220               | 81,815          | 0   | 4,954        | 5,134        | 180           | 7                       | 211                                |
| PRIMARY             | St Mary's and St Peter's Catholic                 | 1,029,019  | 27,505                      | 0                        | 81,715                                 | 1,138,240                           | 1,133,136  | 0                        | 88,755                        | 1,221,891               | 76,612                                | 0                                  | 7,040               | 83,652          | 0   | 5,474        | 5,637        | 163           | 8                       | 201                                |
| PRIMARY             | St Matthew's Catholic Primary School              | 1,038,670  | 28,221                      | 0                        | 84,790                                 | 1,151,680                           | 1,078,695  | 0                        | 89,070                        | 1,167,765               | 11,805                                | 0                                  | 4,280               | 16,085          | 0   | 5,256        | 5,340        | 84            | -1                      | 202                                |
| PRIMARY             | St Matthew's CE Primary School                    | 1,878,751  | 54,413                      | 0                        | 192,515                                | 2,125,679                           | 1,874,135  | 0                        | 187,695                       | 2,061,830               | -59,029                               | 0                                  | -4,820              | -63,849         | 0   | 4,809        | 5,038        | 229           | -30                     | 372                                |
| RECOUPMENT ACADEMY  | St Oswald's CE Primary Academy                    | 1,934,673  | 52,836                      | 0                        | 210,493                                | 2,198,001                           | 2,019,462  | 0                        | 220,780                       | 2,240,242               | 31,953                                | 0                                  | 10,288              | 42,241          | 0   | 5,328        | 5,400        | 71            | 1                       | 374                                |
| PRIMARY             | St Paul's CE Primary School                       | 944,147  | 27,261                      | 0                        | 70,235                                 | 1,041,643                           | 1,011,829  | 0                        | 72,370                        | 1,084,199               | 40,421                                | 0                                  | 2,135               | 42,556          | 0   | 4,833        | 4,912        | 79            | 5                       | 206                                |
| RECOUPMENT ACADEMY  | St Philip's CE Primary Academy                    | 1,025,648  | 28,102                      | 0                        | 85,510                                 | 1,139,260                           | 1,059,052  | 0                        | 85,845                        | 1,144,897               | 5,302                                 | 0                                  | 335                 | 5,637           | 0   | 5,295        | 5,403        | 108           | -3                      | 196                                |
| PRIMARY             | St Stephen's CE Primary School                    | 1,961,059  | 56,267                      | 0                        | 213,290                                | 2,230,616                           | 2,065,315  | 0                        | 218,250                       | 2,283,565               | 47,989                                | 0                                  | 4,960               | 52,949          | 0   | 4,969        | 5,242        | 273           | -12                     | 394                                |
| RECOUPMENT ACADEMY  | St Walburga's Catholic Primary School             | 899,720  | 26,143                      | 0                        | 44,625                                 | 970,488                             | 950,983  | 0                        | 48,330                        | 999,313                 | 25,120                                | 0                                  | 3,705               | 28,825          | 0   | 4,473        | 4,507        | 34            | 4                       | 211                                |
| RECOUPMENT ACADEMY  | St William's Catholic Primary School              | 738,379  | 21,757                      | 0                        | 83,100                                 | 843,237                             | 739,103  | 0                        | 80,025                        | 819,128                 | -21,033                               | 0                                  | -3,075              | -24,108         | 0   | 5,759        | 6,058        | 300           | -10                     | 122                                |
| RECOUPMENT ACADEMY  | St Winefride's Catholic Primary                   | 1,725,219  | 49,689                      | 0                        | 122,905                                | 1,897,813                           | 1,814,687  | 0                        | 123,675                       | 1,938,362               | 39,779                                | 0                                  | 770                 | 40,549          | 0   | 4,460        | 4,653        | 193           | -8                      | 390                                |
| PRIMARY             | Stanbury Village School                           | 532,124  | 14,426                      | 0                        | 14,875                                 | 561,425                             | 552,766  | 0                        | 15,625                        | 568,391                 | 6,216                                 | 0                                  | 750                 | 6,966           | 35,944  | 5,358        | 5,367        | 8             | 1                       | 103                                |
| PRIMARY             | Steeton Primary School                            | 1,257,273  | 35,010                      | 0                        | 65,400                                 | 1,357,683                           | 1,3  |                          |                               |                         |                                       |                                    |                     |                 |   |              |              |               |                         |                                    |

| 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 and dataset  
 Pupil Premium Grant (PPG): ESTIMATES for 23/24 are still based on current confirmed 22/23 PPG FSM Ever6 data, but using the 23/24 rates: £1,455 (p) and £1,035 (s) per eligible Ever 6 FSM pupil, £335 per eligible service child, and £2,530 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 Grant | 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   | 0                                      | 252,675              | 7,959,119  | 7,902,608  | 0                             | 249,280                 | 8,151,888                             | 196,164                            | 0                   | -3,395          | 192,769                                       | 0              | 5,692                | 5,806        | 115           | 7                       | 1,361  |
| RECOUPMENT ACADEMY      | Beckfoot Upper Heaton Academy                    | 4,909,861  | 142,028   | 0                                      | 284,173              | 5,336,061  | 5,146,303  | 0                             | 303,255                 | 5,449,558                             | 94,415                             | 0                   | 19,083          | 113,497                                       | 227,737        | 7,125                | 7,158        | 32            | 10                      | 719  |
| RECOUPMENT ACADEMY      | Belle Vue Girls' Academy                         | 5,709,809  | 175,316   | 0                                      | 317,663              | 6,202,788  | 5,919,974  | 0                             | 326,025                 | 6,245,999                             | 34,848                             | 0                   | 8,363           | 43,211  | 0              | 6,510                | 6,712        | 202           | -22                     | 882  |
| SECONDARY               | Bingley Grammar School                           | 8,705,869  | 267,182   | 0                                      | 333,955              | 9,307,005  | 9,431,112  | 0                             | 352,145                 | 9,783,257                             | 458,061                            | 0                   | 18,190          | 476,251                                       | 0              | 5,756                | 5,973        | 217           | 20                      | 1,579  |
| RECOUPMENT ACADEMY      | Buttershaw Business & Enterprise College Academy | 9,225,217  | 294,414   | 52,856                                 | 666,615              | 10,239,103   | 9,920,989  | 34,782                        | 708,945                 | 10,664,715                            | 401,357                            | -18,075             | 42,330          | 425,612                                       | 0              | 6,625                | 6,795        | 171           | 23                      | 1,460  |
| RECOUPMENT ACADEMY      | Carlton Bolling College                          | 10,427,730   | 320,507   | 109,203                                | 640,078              | 11,497,518   | 10,942,729   | 0                             | 672,050                 | 11,614,779                            | 194,492                            | -109,203            | 31,973          | 117,261                                       | 0              | 6,594                | 6,717        | 123           | -1                      | 1,629  |
| RECOUPMENT ACADEMY      | Dixons City Academy                              | 5,324,532  | 161,794   | 20,555                                 | 242,100              | 5,748,981  | 5,754,870  | 30,245                        | 267,145                 | 6,052,260                             | 268,544                            | 9,690               | 25,045          | 303,278                                       | 0              | 6,206                | 6,366        | 160           | 20                      | 904  |
| RECOUPMENT FREE SCH     | Dixons McMillan Academy                          | 3,809,631  | 118,961   | 24,960                                 | 207,663              | 4,161,214  | 4,152,408  | 36,294                        | 227,000                 | 4,415,702                             | 223,817                            | 11,334              | 19,338          | 254,488                                       | 0              | 6,336                | 6,448        | 111           | 24                      | 644  |
| RECOUPMENT FREE SCH     | Dixons Trinity Academy                           | 3,785,780  | 116,545   | 30,833                                 | 185,180              | 4,118,337  | 4,132,635  | 24,196                        | 199,755                 | 4,356,586                             | 230,311                            | -6,637              | 14,575          | 238,249                                       | 0              | 6,274                | 6,477        | 204           | 16                      | 638  |
| RECOUPMENT ACADEMY      | Bradford Forster Academy                         | 6,833,505  | 212,013   | 0                                      | 480,310              | 7,525,828  | 7,108,533  | 0                             | 499,635                 | 7,608,168                             | 63,015                             | 0                   | 19,325          | 82,340  | 0              | 6,955                | 7,130        | 175           | -16                     | 997  |
| RECOUPMENT ACADEMY      | Feversham College                                | 3,981,893  | 118,504   | 0                                      | 192,515              | 4,292,912  | 4,056,383  | 0                             | 201,710                 | 4,258,093                             | -44,014                            | 0                   | 9,195           | -34,819                                       | 91,878         | 6,561                | 6,596        | 35            | -10                     | 615  |
| RECOUPMENT ACADEMY      | Co-op Academy Grange                             | 10,100,408   | 316,543   | 44,047                                 | 707,125              | 11,168,123   | 10,545,668   | 0                             | 725,995                 | 11,271,663                            | 128,717                            | -44,047             | 18,870          | 103,540                                       | 0              | 6,773                | 6,998        | 225           | -31                     | 1,507  |
| RECOUPMENT ACADEMY      | Hanson School                                    | 9,156,685  | 291,393   | 0                                      | 636,458              | 10,084,535   | 9,465,015  | 0                             | 648,915                 | 10,113,930                            | 16,938                             | 0                   | 12,458          | 29,395  | 0              | 6,598                | 6,819        | 221           | -44                     | 1,388  |
| RECOUPMENT ACADEMY      | Ilkley Grammar School                            | 8,475,350  | 236,770   | 77,766                                 | 120,820              | 8,910,706  | 8,966,835  | 59,650                        | 128,320                 | 9,154,805                             | 254,715                            | -18,117             | 7,500           | 244,099                                       | 0              | 5,679                | 5,715        | 36            | 35                      | 1,569  |
| RECOUPMENT ACADEMY      | Immanuel College Academy                         | 8,132,355  | 249,431   | 105,894                                | 371,138              | 8,858,818  | 8,990,111  | 103,961                       | 407,895                 | 9,501,966                             | 608,324                            | -1,934              | 36,758          | 643,148                                       | 0              | 6,043                | 6,209        | 166           | 61                      | 1,448  |
| RECOUPMENT FREE SCH     | Dixons Kings Academy                             | 5,122,551  | 157,070   | 0                                      | 251,668              | 5,531,289  | 5,392,398  | 0                             | 263,925                 | 5,656,323                             | 112,777                            | 0                   | 12,258          | 125,034                                       | 0              | 6,278                | 6,427        | 149           | -2                      | 839  |
| RECOUPMENT ACADEMY      | Laisterdyke Leadership Academy                   | 5,583,659  | 174,026   | 0                                      | 390,553              | 6,148,237  | 6,322,746  | 0                             | 436,770                 | 6,759,516                             | 565,061                            | 0                   | 46,218          | 611,278                                       | 0              | 6,937                | 7,185        | 248           | 50                      | 880  |
| RECOUPMENT ACADEMY      | Beckfoot Oakbank Academy                         | 8,673,281  | 272,326   | 0                                      | 515,250              | 9,460,857  | 9,246,838  | 0                             | 541,765                 | 9,788,603                             | 301,231                            | 0                   | 26,515          | 327,746                                       | 0              | 6,335                | 6,535        | 199           | 3                       | 1,415  |
| RECOUPMENT ACADEMY      | Oasis Academy Lister Park                        | 5,550,240  | 170,992   | 33,769                                 | 365,435              | 6,120,437  | 5,569,946  | 0                             | 365,355                 | 5,935,301                             | -151,287                           | -33,769             | -80             | -185,136                                      | 0              | 6,803                | 6,962        | 160           | -41                     | 800  |
| RECOUPMENT FREE SCH     | One In A Million (Free School)                   | 2,575,601  | 80,439  | 0                                      | 183,650              | 2,839,690  | 2,747,664  | 0                             | 192,510                 | 2,940,174                             | 91,624                             | 0                   | 8,860           | 100,484                                       | 0              | 7,140                | 7,308        | 168           | 4                       | 376  |
| SECONDARY               | Parkside School                                  | 5,934,816  | 183,632   | 0                                      | 271,435              | 6,389,883  | 6,271,348  | 0                             | 289,970                 | 6,561,318                             | 152,899                            | 0                   | 18,535          | 171,434                                       | 0              | 5,866                | 6,007        | 141           | 1                       | 1,044  |
| RECOUPMENT ACADEMY      | Trinity Academy Bradford                         | 5,424,284  | 170,624   | 8,809                                  | 305,645              | 5,909,362  | 5,666,750  | 19,659                        | 320,485                 | 6,006,894                             | 71,842                             | 10,850              | 14,840          | 97,532  | 0              | 6,308                | 6,410        | 103           | -3                      | 884  |
| RECOUPMENT ACADEMY      | Dixons Cottingley Academy                        | 5,262,756  | 160,186   | 0                                      | 306,828              | 5,729,769  | 5,768,961  | 0                             | 341,550                 | 6,110,511                             | 346,019                            | 0                   | 34,723          | 380,742                                       | 23,498         | 6,646                | 6,669        | 24            | 49                      | 865  |
| SECONDARY               | St Bede's & St Joseph's Catholic College         | 8,696,769  | 264,239   | 0                                      | 405,998              | 9,367,006  | 9,271,918  | 0                             | 428,720                 | 9,700,638                             | 310,910                            | 0                   | 22,723          | 333,632                                       | 0              | 6,150                | 6,295        | 144           | 16                      | 1,473  |
| RECOUPMENT ACADEMY      | The Holy Family Catholic School                  | 4,710,033  | 140,574   | 0                                      | 225,565              | 5,076,172  | 4,927,500  | 0                             | 230,805                 | 5,158,305                             | 76,893                             | 0                   | 5,240           | 82,133  | 0              | 6,485                | 6,759        | 274           | -19                     | 729  |
| RECOUPMENT ACADEMY      | Beckfoot Thornton Academy                        | 8,184,775  | 252,675   | 0                                      | 492,630              | 8,930,081  | 8,634,416  | 0                             | 508,070                 | 9,142,486                             | 196,965                            | 0                   | 15,440          | 212,405                                       | 0              | 6,446                | 6,647        | 201           | -10                     | 1,299  |
| SECONDARY               | Titus Salt School                                | 7,409,110  | 228,239   | 1,024                                  | 361,205              | 7,999,577  | 7,919,112  | 1,024                         | 423,905                 | 8,344,040                             | 281,763                            | 0                   | 62,700          | 344,463                                       | 0              | 6,061                | 6,240        | 179           | 9                       | 1,269  |
| RECOUPMENT ACADEMY      | Tong Leadership Academy                          | 5,805,683  | 184,119   | 0                                      | 447,658              | 6,437,460  | 5,717,244  | 0                             | 445,020                 | 6,162,264                             | -272,559                           | 0                   | -2,638          | -275,196                                      | 0              | 7,030                | 7,093        | 63            | -46                     | 806  |
| RECOUPMENT ACADEMY      | Carlton Keighley Academy                         | 4,439,735  | 128,216   | 0                                      | 228,123              | 4,796,073  | 4,871,969  | 0                             | 255,070                 | 5,127,039                             | 304,018                            | 0                   | 26,948          | 330,966                                       | 106,444        | 6,869                | 6,891        | 22            | 42                      | 707  |
| RECOUPMENT FREE SCH     | Bronte Girls' Academy                            | 3,239,758  | 98,686  | 0                                      | 152,183              | 3,490,627  | 4,296,811  | 0                             | 213,210                 | 4,510,021                             | 958,366                            | 0                   | 61,028          | 1,019,394                                     | 0              | 6,499                | 6,514        | 15            | 146                     | 660  |
| RECOUPMENT FREE SCH     | Eden Boys Leadership Academy                     | 2,674,572  | 78,900  | 0                                      | 96,038               | 2,849,509  | 3,617,561  | 0                             | 133,515                 | 3,751,076                             | 864,090                            | 0                   | 37,478          | 901,567                                       | 0              | 6,344                | 6,554        | 209           | 118                     | 552  |
| <b>SECONDARY TOTALS</b> |  | <b>195,347,099</b>                                     | <b>5,991,937</b>                                      | <b>509,718</b>                         | <b>10,638,325</b>    | <b>212,487,079</b>                                     | <b>208,679,352</b>                                 | <b>309,809</b>                | <b>11,308,715</b>       | <b>220,297,876</b>                    | <b>7,340,316</b>                   | <b>-199,909</b>     | <b>670,390</b>  | <b>7,810,797</b>                              | <b>449,557</b> | <b>6,386</b>         | <b>6,534</b> | <b>148</b>    | <b>409</b>              | <b>31,938</b>                                  |

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 and dataset

Pupil Premium Grant (PPG): ESTIMATES for 23/24 are still based on current confirmed 22/23 PPG FSM Ever6 data, but using the 23/24 rates: £1,455 (p) and £1,035 (s) per eligible Ever 6 FSM pupil, £335 per eligible service child, and £2,530 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   | 679,925                                | 8,193,543                           | 7,683,259  | 12,098   | 693,200                       | 8,388,557               | 191,151                               | -9,412                             | 13,275              | 195,014         | 0   | 6,062        | 6,287        | 226           | -14                     | 1,222                      |
| RECOUPMENT ACADEMY        | Bradford Academy                     | 9,353,597  | 293,289                    | 0  | 796,820                                | 10,443,706                          | 9,868,442  | 0  | 829,115                       | 10,697,557              | 221,556                               | 0                                  | 32,295              | 253,851         | 0   | 6,200        | 6,375        | 175           | -8                      | 1,548                      |
| RECOUPMENT FREE SCH       | Bradford Girls Grammar (Free School) | 5,337,116  | 161,811                    | 35,238   | 335,435                                | 5,869,600                           | 5,793,906  | 36,294   | 356,720                       | 6,186,920               | 294,979                               | 1,056                              | 21,285              | 317,320         | 0   | 5,515        | 5,721        | 206           | 22                      | 1,019                      |
| RECOUPMENT ACADEMY        | Dixons Allerton Academy              | 9,352,395  | 283,578                    | 0  | 570,113                                | 10,206,086                          | 9,837,121  | 0  | 598,500                       | 10,435,621              | 201,148                               | 0                                  | 28,388              | 229,535         | 0   | 5,897        | 6,024        | 127           | -1                      | 1,633                      |
| <b>ALL THROUGH TOTALS</b> |                                      | <b>31,303,794</b>                                      | <b>970,101</b>             | <b>56,747</b>                                      | <b>2,382,293</b>                       | <b>34,712,935</b>                   | <b>33,182,729</b>                                      | <b>48,392</b>                                      | <b>2,477,535</b>              | <b>35,708,655</b>       | <b>908,834</b>                        | <b>-8,356</b>                      | <b>95,243</b>       | <b>995,721</b>  | <b>0</b>                                      | <b>5,951</b> | <b>6,129</b> | <b>178</b>    | <b>-1</b>               | <b>5,422</b>               |

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 and dataset

Pupil Premium Grant (PPG): ESTIMATES for 23/24 are still based on current confirmed 22/23 PPG FSM Ever6 data, but using the 23/24 rates: £1,455 (p) and £1,035 (s) per eligible Ever 6 FSM pupil, £335 per eligible service child, and £2,530 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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Summary of the change in the cost of formula factors using October 2022 Census data (vs. October 2021 Census data). The same pupil numbers (October 2022) are used in both years – this is just showing the cost difference resulting from change in the other data used to calculate formula funding allocations.

| Factor                                 | Prim £            | Prim £app       | Sec £             | Sec £app        | Total £             |
|--|-------------------|-----------------|-------------------|-----------------|---------------------|
| <b>FSM Flat</b>                        | <b>+ £231,801</b> | <b>+ £4.36</b>  | <b>+ £391,762</b> | <b>+ £10.99</b> | <b>+ £623,563</b>   |
| FSM Ever 6                             | + £63,132         | + £1.19         | + £93,050         | + £2.61         | + £156,182          |
| IDACI                                  | - £29,554         | - £0.56         | + £17,284         | + £0.48         | - £12,270           |
| <b>Pupil Mobility</b>                  | <b>+ £160,822</b> | <b>+ £3.02</b>  | + £33,616         | + £0.94         | <b>+ £194,438</b>   |
| <b>Low Prior Attainment</b>            | <b>+ £565,919</b> | <b>+ £10.63</b> | - £174,904        | - £4.91         | <b>+ £391,015</b>   |
| English as an Additional Language      | - £61,122         | - £1.15         | + £3,544          | + £0.10         | - £57,578           |
| MFL (Primary £4,405; Secondary £5,715) | - £197,505        | - £3.71         | + £7,592          | + £0.21         | - £189,913          |
| MFG (+ 0.50%)                          | - £86,510         | - £1.63         | + £55,253         | + £1.55         | - £31,257           |
| <b>Total Change in Cost</b>            | <b>+ £646,983</b> | <b>+ £12.15</b> | <b>+ £427,197</b> | <b>+ £11.97</b> | <b>+ £1,074,180</b> |

Following the use of the October 2022 Census dataset

Primary phase: 44 out of 156 schools (28%), including academies, are funded on the Minimum Funding Guarantee. 27 schools (17%), including academies, are funded at the £4,405 minimum per pupil level. All other schools and academies are funded above £4,405 per pupil.

Secondary phase: 4 out of 31 schools (13%), including academies, are funded on the Minimum Funding Guarantee. 1 academy (3%) is funded at the £5,715 minimum per pupil level. All other schools and academies are funded above £5,715 per pupil.

All through academies: None of the 4 academies are funded on the Minimum Funding Guarantee. All of these academies are also funded above their composite minimum per pupil funding levels.

In total, 48 out of 191 schools and academies (25%) are funded on the Minimum Funding Guarantee. This is reduced from 73 (38%) in 2022/23. In total, 31 out of 191 schools and academies (16%) are funded on the minimum per pupil funding levels. This is reduced from 36 (19%) in 2022/23.

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2023/24 - Maintained Nursery Schools - Proposed Indicative EYSFF Rates of Funding

| Type    | Setting                      | 2022/23 2<br>Year Old<br>Rate of<br>Funding<br>Per Hour | 2022/23 3&4<br>Year Old<br>Rate of<br>Funding Per<br>Hour | 2022/23 3&4<br>Year Old<br>Effective Base<br>Rate Funding<br>Per Hour | 2022/23 3&4<br>Year Old<br>Effective<br>Deprivation<br>Rate Funding<br>Per Hour | Protected by MNS Supplement                             |   |   |   | 3&4 Year Old Funding Protection                 |  |                                      |                                       |
|---------|------------------------------|---|---|---|---|---|---|---|---|---|--|--------------------------------------|---------------------------------------|
|         |                              |   |   |   |   | 2023/24 2<br>Year Old<br>Rate of<br>Funding Per<br>Hour | 2023/24 3&4<br>Year Old<br>Rate of<br>Funding Per<br>Hour | 2023/24 3&4<br>Year Old<br>Effective Base<br>Rate Funding<br>Per Hour | 2023/24 3&4<br>Year Old<br>Effective<br>Deprivation<br>Rate Funding<br>Per Hour | Base Rate<br>Protection<br>Value (vs.<br>£4.46) | Deprivation<br>Rate<br>Protection<br>Value | Total Value of<br>Rate<br>Protection | Funding<br>Rate Without<br>Protection |
| NURSERY | Abbey Green Nursery          | £5.55   | £7.31   | £5.98   | £1.33   | £5.61   | £7.44   | £6.08   | £1.36   | £1.62   | £0.80                                      | £2.42                                | £5.02                                 |
| NURSERY | Canterbury Children's Centre | £5.55   | £7.46   | £5.98   | £1.48   | £5.61   | £7.59   | £6.08   | £1.51   | £1.62   | £0.96                                      | £2.58                                | £5.01                                 |
| NURSERY | Hirst Wood Nursery           | £5.55   | £6.44   | £5.98   | £0.46   | £5.61   | £6.55   | £6.08   | £0.47   | £1.62   | £0.27                                      | £1.89                                | £4.66                                 |
| NURSERY | Lilycroft Nursery            | £5.55   | £6.96   | £5.98   | £0.98   | £5.61   | £7.08   | £6.08   | £1.00   | £1.62   | £0.58                                      | £2.20                                | £4.88                                 |
| NURSERY | Midland Road Nursery         | £5.55   | £7.13   | £5.98   | £1.15   | £5.61   | £7.25   | £6.08   | £1.17   | £1.62   | £0.72                                      | £2.34                                | £4.91                                 |
| NURSERY | St Edmund's Nursery          | £5.55   | £6.87   | £5.98   | £0.89   | £5.61   | £6.98   | £6.08   | £0.90   | £1.62   | £0.53                                      | £2.15                                | £4.84                                 |
| NURSERY | Strong Close Nursery         | £5.55   | £6.60   | £5.98   | £0.62   | £5.61   | £6.71   | £6.08   | £0.63   | £1.62   | £0.33                                      | £1.95                                | £4.76                                 |

Notes  
 2022/23 rates of funding shown here are taken from the Confirmed Indicative Budgets for maintained nursery schools published in March 2022  
 The sustainability lump sum factor allocates protected funding in addition to the values shown here  
 Please be aware that our EYSFF proposals are out for consultation & are subject confirmation.

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2023/24 Early Years Single Funding Formula - Nursery Classes INDICATIVE 3&4 Year Old Funding Rates

| Type               | Setting  | 2023/24 Total PROPOSED INDICATIVE Funding Rate | 2022/23 Actual Total Funding Rate | Diff in Total Rate v. 2022/23 | % Total Rates Diff | Addition of Quality Supplement Rate | Diff in Universal Base Rate (UBR) | INDICATIVE Diff in Deprivation & SEND Rate | £% Diff in Funding Rate (Excluding Quality Supplement) |
|--------------------|--|--|-----------------------------------|-------------------------------|--------------------|-------------------------------------|-----------------------------------|--|--|
| RECOUPMENT ACADEMY | All Saints' CE Primary School (Bradford)       | £5.17  | £4.96                             | £0.20                         | 4.1%               | £0.23                               | £0.07                             | -£0.10                                     | -0.5%  |
| RECOUPMENT ACADEMY | Beckfoot Allerton Primary Academy              | £5.06  | £4.82                             | £0.24                         | 5.0%               | £0.23                               | £0.07                             | -£0.06                                     | 0.2%   |
| RECOUPMENT ACADEMY | Appleton Academy                               | £5.12  | £4.85                             | £0.27                         | 5.5%               | £0.23                               | £0.07                             | -£0.03                                     | 0.8%   |
| PRIMARY            | Ashlands Primary School                        | £4.77  | £4.48                             | £0.29                         | 6.5%               | £0.23                               | £0.07                             | -£0.01                                     | 1.4%   |
| RECOUPMENT ACADEMY | Atlas School                                   | £5.22  | £4.97                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.4%   |
| RECOUPMENT ACADEMY | Baildon CE Primary School                      | £4.78  | £4.49                             | £0.29                         | 6.4%               | £0.23                               | £0.07                             | -£0.01                                     | 1.3%   |
| PRIMARY            | Bankfoot Primary School                        | £5.15  | £4.91                             | £0.24                         | 4.8%               | £0.23                               | £0.07                             | -£0.06                                     | 0.1%   |
| RECOUPMENT ACADEMY | Barkerend Primary Leadership Academy           | £5.28  | £5.05                             | £0.23                         | 4.6%               | £0.23                               | £0.07                             | -£0.07                                     | 0.0%   |
| RECOUPMENT ACADEMY | Bowling Park Primary School                    | £5.16  | £4.93                             | £0.24                         | 4.8%               | £0.23                               | £0.07                             | -£0.06                                     | 0.1%   |
| PRIMARY            | Brackenhill Primary School                     | £5.08  | £4.84                             | £0.23                         | 4.8%               | £0.23                               | £0.07                             | -£0.07                                     | 0.1%   |
| RECOUPMENT ACADEMY | Bradford Academy                               | £5.12  | £4.88                             | £0.24                         | 4.9%               | £0.23                               | £0.07                             | -£0.06                                     | 0.2%   |
| RECOUPMENT ACADEMY | Byron Primary Academy                          | £5.15  | £4.92                             | £0.23                         | 4.7%               | £0.23                               | £0.07                             | -£0.07                                     | 0.0%   |
| PRIMARY            | Carwood Primary School                         | £5.34  | £5.17                             | £0.18                         | 3.4%               | £0.23                               | £0.07                             | -£0.12                                     | -1.0%  |
| PRIMARY            | Cavendish Primary School                       | £5.08  | £4.83                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.4%   |
| RECOUPMENT ACADEMY | Christ Church Primary Academy                  | £5.03  | £4.77                             | £0.26                         | 5.6%               | £0.23                               | £0.07                             | -£0.04                                     | 0.7%   |
| RECOUPMENT ACADEMY | Clayton St John's CE Primary Academy           | £4.98  | £4.70                             | £0.28                         | 5.9%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| RECOUPMENT ACADEMY | Copthorne Primary Academy                      | £5.08  | £4.81                             | £0.27                         | 5.5%               | £0.23                               | £0.07                             | -£0.03                                     | 0.7%   |
| RECOUPMENT ACADEMY | Cottingley Village Primary School              | £4.88  | £4.61                             | £0.28                         | 6.0%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| PRIMARY            | Crossflatts Primary School                     | £4.81  | £4.52                             | £0.29                         | 6.4%               | £0.23                               | £0.07                             | -£0.01                                     | 1.3%   |
| RECOUPMENT ACADEMY | Crossley Hall Primary School                   | £5.04  | £4.79                             | £0.25                         | 5.3%               | £0.23                               | £0.07                             | -£0.05                                     | 0.5%   |
| RECOUPMENT ACADEMY | Denholme Primary Academy                       | £4.86  | £4.58                             | £0.27                         | 6.0%               | £0.23                               | £0.07                             | -£0.03                                     | 1.0%   |
| RECOUPMENT ACADEMY | Dixons Allerton Academy                        | £5.04  | £4.80                             | £0.24                         | 5.0%               | £0.23                               | £0.07                             | -£0.06                                     | 0.3%   |
| RECOUPMENT ACADEMY | Dixons Marchbank Academy                       | £5.13  | £4.89                             | £0.24                         | 4.9%               | £0.23                               | £0.07                             | -£0.06                                     | 0.2%   |
| RECOUPMENT ACADEMY | East Morton CE Primary Academy                 | £4.98  | £4.70                             | £0.28                         | 5.9%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| RECOUPMENT ACADEMY | Eastwood Primary Academy                       | £5.15  | £4.91                             | £0.24                         | 4.8%               | £0.23                               | £0.07                             | -£0.06                                     | 0.2%   |
| PRIMARY            | Eldwick Primary School                         | £4.77  | £4.48                             | £0.30                         | 6.6%               | £0.23                               | £0.07                             | £0.00                                      | 1.5%   |
| PRIMARY            | Fagley Primary School                          | £5.18  | £4.95                             | £0.23                         | 4.6%               | £0.23                               | £0.07                             | -£0.07                                     | -0.1%  |
| PRIMARY            | Farfield Primary                               | £5.11  | £4.89                             | £0.22                         | 4.5%               | £0.23                               | £0.07                             | -£0.08                                     | -0.2%  |
| RECOUPMENT ACADEMY | Farnham Primary Academy                        | £5.11  | £4.87                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.3%   |
| RECOUPMENT ACADEMY | Fearnville Primary Academy                     | £5.20  | £4.98                             | £0.22                         | 4.4%               | £0.23                               | £0.07                             | -£0.08                                     | -0.2%  |
| RECOUPMENT ACADEMY | Feversham Primary Academy                      | £5.21  | £4.98                             | £0.23                         | 4.7%               | £0.23                               | £0.07                             | -£0.07                                     | 0.0%   |
| PRIMARY            | Foxhill Primary School                         | £4.87  | £4.58                             | £0.28                         | 6.2%               | £0.23                               | £0.07                             | -£0.02                                     | 1.2%   |
| PRIMARY            | Frizinghall Primary School                     | £5.00  | £4.74                             | £0.26                         | 5.5%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| PRIMARY            | Girlington Primary School                      | £5.16  | £4.91                             | £0.24                         | 4.9%               | £0.23                               | £0.07                             | -£0.06                                     | 0.3%   |
| RECOUPMENT ACADEMY | Glenaire Primary School                        | £5.03  | £4.75                             | £0.28                         | 5.9%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| RECOUPMENT ACADEMY | Green Lane Primary School                      | £5.30  | £5.08                             | £0.22                         | 4.4%               | £0.23                               | £0.07                             | -£0.08                                     | -0.1%  |
| RECOUPMENT ACADEMY | Greengates Primary School                      | £5.02  | £4.76                             | £0.26                         | 5.5%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| RECOUPMENT ACADEMY | Grove House Primary School                     | £4.96  | £4.68                             | £0.28                         | 6.1%               | £0.23                               | £0.07                             | -£0.02                                     | 1.1%   |
| RECOUPMENT ACADEMY | Haworth Primary Academy                        | £4.86  | £4.58                             | £0.28                         | 6.2%               | £0.23                               | £0.07                             | -£0.02                                     | 1.2%   |
| RECOUPMENT ACADEMY | Beckfoot Heaton Primary Academy                | £5.04  | £4.78                             | £0.26                         | 5.4%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| RECOUPMENT ACADEMY | High Craggs Primary Leadership Academy         | £5.17  | £4.91                             | £0.26                         | 5.2%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| PRIMARY            | Hill Top CE Primary School                     | £4.97  | £4.69                             | £0.27                         | 5.8%               | £0.23                               | £0.07                             | -£0.03                                     | 0.9%   |
| RECOUPMENT ACADEMY | Hollingwood Primary Academy                    | £4.97  | £4.69                             | £0.28                         | 5.9%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| RECOUPMENT ACADEMY | Holybrook Primary Academy                      | £5.20  | £4.94                             | £0.26                         | 5.3%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| RECOUPMENT ACADEMY | Holycroft Primary Academy                      | £5.12  | £4.87                             | £0.25                         | 5.2%               | £0.23                               | £0.07                             | -£0.05                                     | 0.5%   |
| PRIMARY            | Home Farm Primary School                       | £5.01  | £4.75                             | £0.25                         | 5.4%               | £0.23                               | £0.07                             | -£0.05                                     | 0.5%   |
| RECOUPMENT ACADEMY | Horton Grange Primary Academy                  | £5.09  | £4.84                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.3%   |
| PRIMARY            | Ingrow Primary School                          | £5.06  | £4.83                             | £0.23                         | 4.7%               | £0.23                               | £0.07                             | -£0.07                                     | 0.0%   |
| RECOUPMENT ACADEMY | Iqra Primary Academy                           | £5.23  | £5.01                             | £0.22                         | 4.4%               | £0.23                               | £0.07                             | -£0.08                                     | -0.2%  |
| PRIMARY            | Keelham Primary School                         | £4.87  | £4.58                             | £0.29                         | 6.4%               | £0.23                               | £0.07                             | -£0.01                                     | 1.3%   |
| PRIMARY            | Keighley St Andrew's CE Primary School         | £5.21  | £4.98                             | £0.23                         | 4.6%               | £0.23                               | £0.07                             | -£0.07                                     | 0.0%   |
| PRIMARY            | Killinghall Primary School                     | £5.13  | £4.90                             | £0.24                         | 4.9%               | £0.23                               | £0.07                             | -£0.06                                     | 0.2%   |
| PRIMARY            | Knowleswood Primary School                     | £5.36  | £5.12                             | £0.23                         | 4.6%               | £0.23                               | £0.07                             | -£0.07                                     | 0.1%   |
| RECOUPMENT ACADEMY | Lapage Primary School and Nursery              | £5.14  | £4.91                             | £0.23                         | 4.7%               | £0.23                               | £0.07                             | -£0.07                                     | 0.0%   |
| RECOUPMENT ACADEMY | Lees Primary Academy                           | £4.87  | £4.59                             | £0.28                         | 6.0%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| PRIMARY            | Ley Top Primary School                         | £5.14  | £4.94                             | £0.20                         | 4.1%               | £0.23                               | £0.07                             | -£0.10                                     | -0.6%  |
| PRIMARY            | Lidget Green Primary School                    | £5.11  | £4.86                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.3%   |
| RECOUPMENT ACADEMY | Carlton Mills Primary School                   | £5.08  | £4.83                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.4%   |
| PRIMARY            | Long Lee Primary School                        | £4.95  | £4.67                             | £0.28                         | 6.0%               | £0.23                               | £0.07                             | -£0.02                                     | 1.1%   |
| PRIMARY            | Low Ash Primary School                         | £4.94  | £4.66                             | £0.28                         | 6.0%               | £0.23                               | £0.07                             | -£0.02                                     | 1.1%   |
| RECOUPMENT ACADEMY | Lower Fields Primary School                    | £5.20  | £4.95                             | £0.26                         | 5.2%               | £0.23                               | £0.07                             | -£0.04                                     | 0.5%   |
| RECOUPMENT ACADEMY | Margaret McMillan Primary School               | £5.03  | £4.78                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.3%   |
| RECOUPMENT ACADEMY | Marshfield Primary School                      | £5.11  | £4.85                             | £0.26                         | 5.3%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| RECOUPMENT ACADEMY | Merlin Top Primary Academy                     | £5.22  | £4.97                             | £0.26                         | 5.2%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| RECOUPMENT ACADEMY | Miriam Lord Community Primary School           | £5.21  | £4.96                             | £0.24                         | 4.9%               | £0.23                               | £0.07                             | -£0.06                                     | 0.3%   |
| PRIMARY            | Myrtle Park Primary School                     | £4.85  | £4.57                             | £0.28                         | 6.1%               | £0.23                               | £0.07                             | -£0.02                                     | 1.1%   |
| RECOUPMENT ACADEMY | Beckfoot Nessfield Primary Academy             | £4.97  | £4.69                             | £0.28                         | 6.0%               | £0.23                               | £0.07                             | -£0.02                                     | 1.1%   |
| PRIMARY            | Newby Primary School                           | £5.18  | £4.95                             | £0.23                         | 4.7%               | £0.23                               | £0.07                             | -£0.07                                     | 0.1%   |
| PRIMARY            | Newhall Park Primary School                    | £4.98  | £4.72                             | £0.26                         | 5.4%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| RECOUPMENT ACADEMY | Oakworth Primary Academy                       | £4.81  | £4.52                             | £0.29                         | 6.5%               | £0.23                               | £0.07                             | -£0.01                                     | 1.4%   |
| RECOUPMENT ACADEMY | Oldfield Primary School                        | £4.84  | £4.55                             | £0.28                         | 6.3%               | £0.23                               | £0.07                             | -£0.02                                     | 1.2%   |
| RECOUPMENT ACADEMY | Our Lady of Victories Catholic Primary Academy | £5.15  | £4.91                             | £0.24                         | 4.9%               | £0.23                               | £0.07                             | -£0.06                                     | 0.2%   |
| RECOUPMENT ACADEMY | The Co-op Academy Parkland                     | £5.13  | £4.89                             | £0.24                         | 5.0%               | £0.23                               | £0.07                             | -£0.06                                     | 0.3%   |
| RECOUPMENT ACADEMY | Parkwood Primary School                        | £5.16  | £4.88                             | £0.27                         | 5.6%               | £0.23                               | £0.07                             | -£0.03                                     | 0.9%   |
| PRIMARY            | Peel Park Primary School                       | £5.10  | £4.86                             | £0.24                         | 5.0%               | £0.23                               | £0.07                             | -£0.06                                     | 0.2%   |
| PRIMARY            | Poplars Farm Primary School                    | £5.00  | £4.73                             | £0.28                         | 5.9%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| RECOUPMENT ACADEMY | Beckfoot Priestthorpe Primary School           | £4.88  | £4.61                             | £0.28                         | 6.0%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| RECOUPMENT ACADEMY | The Co-op Academy Princeville                  | £5.09  | £4.84                             | £0.25                         | 5.2%               | £0.23                               | £0.07                             | -£0.05                                     | 0.5%   |
| RECOUPMENT ACADEMY | Reevy Hill Primary School                      | £5.14  | £4.89                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.4%   |
| PRIMARY            | Riddlesden St Mary's CE Primary                | £4.98  | £4.70                             | £0.28                         | 5.9%               | £0.23                               | £0.07                             | -£0.02                                     | 1.0%   |
| PRIMARY            | Russell Hall Primary School                    | £4.91  | £4.64                             | £0.27                         | 5.8%               | £0.23                               | £0.07                             | -£0.03                                     | 0.9%   |
| RECOUPMENT ACADEMY | Ryecroft Primary Academy                       | £5.32  | £5.07                             | £0.25                         | 5.0%               | £0.23                               | £0.07                             | -£0.05                                     | 0.4%   |
| PRIMARY            | Sandal Primary School and Nursery              | £4.81  | £4.52                             | £0.29                         | 6.4%               | £0.23                               | £0.07                             | -£0.01                                     | 1.3%   |
| PRIMARY            | Sandy Lane Primary School                      | £4.88  | £4.61                             | £0.27                         | 5.9%               | £0.23                               | £0.07                             | -£0.03                                     | 0.9%   |
| RECOUPMENT ACADEMY | Shipley CE Primary Academy                     | £4.95  | £4.69                             | £0.26                         | 5.6%               | £0.23                               | £0.07                             | -£0.04                                     | 0.7%   |

| Type               | Setting   | 2023/24 Total PROPOSED INDICATIVE Funding Rate | 2022/23 Actual Total Funding Rate | Diff in Total Rate v. 2022/23 | % Total Rates Diff | Addition of Quality Supplement Rate | Diff in Universal Base Rate (UBR) | INDICATIVE Diff in Deprivation & SEND Rate | £% Diff in Funding Rate (Excluding Quality Supplement) |
|--------------------|---|--|-----------------------------------|-------------------------------|--------------------|-------------------------------------|-----------------------------------|--|--|
| RECOUPMENT ACADEMY | Shirley Manor Primary Academy                     | £5.06  | £4.85                             | £0.21                         | 4.4%               | £0.23                               | £0.07                             | -£0.09                                     | -0.3%  |
| PRIMARY            | Silsden Primary School                            | £4.84  | £4.55                             | £0.29                         | 6.4%               | £0.23                               | £0.07                             | -£0.01                                     | 1.3%   |
| RECOUPMENT ACADEMY | Southmere Primary Academy                         | £5.29  | £5.06                             | £0.23                         | 4.6%               | £0.23                               | £0.07                             | -£0.07                                     | 0.1%   |
| RECOUPMENT ACADEMY | Dixons Manningham Primary Academy                 | £5.27  | £5.02                             | £0.24                         | 4.8%               | £0.23                               | £0.07                             | -£0.06                                     | 0.2%   |
| RECOUPMENT ACADEMY | St Anne's Catholic Primary Academy                | £5.11  | £4.90                             | £0.21                         | 4.3%               | £0.23                               | £0.07                             | -£0.09                                     | -0.4%  |
| RECOUPMENT ACADEMY | St Anthony's Catholic Primary School (Clayton)    | £5.02  | £4.76                             | £0.26                         | 5.4%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| RECOUPMENT ACADEMY | St Columba's Catholic Primary School              | £5.21  | £5.00                             | £0.21                         | 4.3%               | £0.23                               | £0.07                             | -£0.09                                     | -0.3%  |
| RECOUPMENT ACADEMY | St Cuthbert & the First Martyrs' Catholic Primary | £5.04  | £4.79                             | £0.25                         | 5.2%               | £0.23                               | £0.07                             | -£0.05                                     | 0.4%   |
| RECOUPMENT ACADEMY | St Francis' Catholic Primary School               | £4.94  | £4.67                             | £0.27                         | 5.9%               | £0.23                               | £0.07                             | -£0.03                                     | 1.0%   |
| RECOUPMENT ACADEMY | St James Primary Academy                          | £5.10  | £4.84                             | £0.27                         | 5.6%               | £0.23                               | £0.07                             | -£0.03                                     | 0.8%   |
| RECOUPMENT ACADEMY | St John's CE Primary School                       | £5.10  | £4.85                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.3%   |
| RECOUPMENT ACADEMY | St Joseph's Catholic Primary School (Bradford)    | £5.21  | £5.00                             | £0.20                         | 4.1%               | £0.23                               | £0.07                             | -£0.10                                     | -0.5%  |
| RECOUPMENT ACADEMY | St Joseph's Catholic Primary, Keighley            | £5.03  | £4.80                             | £0.23                         | 4.8%               | £0.23                               | £0.07                             | -£0.07                                     | 0.0%   |
| PRIMARY            | St Mary's and St Peter's Catholic                 | £5.16  | £4.92                             | £0.24                         | 4.8%               | £0.23                               | £0.07                             | -£0.06                                     | 0.1%   |
| PRIMARY            | St Matthew's Catholic Primary School              | £5.12  | £4.90                             | £0.23                         | 4.6%               | £0.23                               | £0.07                             | -£0.07                                     | -0.1%  |
| PRIMARY            | St Matthew's CE Primary School                    | £5.07  | £4.81                             | £0.25                         | 5.3%               | £0.23                               | £0.07                             | -£0.05                                     | 0.5%   |
| RECOUPMENT ACADEMY | St Oswald's CE Primary Academy                    | £5.26  | £5.04                             | £0.22                         | 4.3%               | £0.23                               | £0.07                             | -£0.08                                     | -0.2%  |
| RECOUPMENT ACADEMY | St Philip's CE Primary Academy                    | £5.16  | £4.92                             | £0.24                         | 5.0%               | £0.23                               | £0.07                             | -£0.06                                     | 0.3%   |
| PRIMARY            | St Stephen's CE Primary School                    | £5.19  | £4.95                             | £0.24                         | 4.8%               | £0.23                               | £0.07                             | -£0.06                                     | 0.1%   |
| RECOUPMENT ACADEMY | St Walburga's Catholic Primary School             | £4.91  | £4.64                             | £0.27                         | 5.7%               | £0.23                               | £0.07                             | -£0.03                                     | 0.8%   |
| RECOUPMENT ACADEMY | St Winefride's Catholic Primary                   | £4.99  | £4.73                             | £0.26                         | 5.4%               | £0.23                               | £0.07                             | -£0.04                                     | 0.5%   |
| PRIMARY            | Stanbury Village School                           | £4.86  | £4.60                             | £0.26                         | 5.7%               | £0.23                               | £0.07                             | -£0.04                                     | 0.7%   |
| PRIMARY            | Swain House Primary School                        | £5.02  | £4.76                             | £0.25                         | 5.3%               | £0.23                               | £0.07                             | -£0.05                                     | 0.5%   |
| PRIMARY            | Thackley Primary School                           | £4.88  | £4.61                             | £0.27                         | 5.9%               | £0.23                               | £0.07                             | -£0.03                                     | 1.0%   |
| RECOUPMENT ACADEMY | Thornbury Primary Leadership Academy              | £5.20  | £4.97                             | £0.24                         | 4.8%               | £0.23                               | £0.07                             | -£0.06                                     | 0.1%   |
| RECOUPMENT ACADEMY | Thornton Primary School                           | £4.94  | £4.66                             | £0.27                         | 5.9%               | £0.23                               | £0.07                             | -£0.03                                     | 1.0%   |
| PRIMARY            | Trinity All Saints CE Primary School              | £4.86  | £4.59                             | £0.27                         | 5.8%               | £0.23                               | £0.07                             | -£0.03                                     | 0.8%   |
| RECOUPMENT ACADEMY | Victoria Primary School                           | £5.16  | £4.91                             | £0.25                         | 5.1%               | £0.23                               | £0.07                             | -£0.05                                     | 0.5%   |
| PRIMARY            | Wellington Primary School                         | £4.97  | £4.70                             | £0.26                         | 5.5%               | £0.23                               | £0.07                             | -£0.04                                     | 0.7%   |
| RECOUPMENT ACADEMY | Westbourne Primary School                         | £5.25  | £5.02                             | £0.23                         | 4.6%               | £0.23                               | £0.07                             | -£0.07                                     | 0.0%   |
| RECOUPMENT ACADEMY | Westminster CE Primary Academy                    | £5.21  | £4.98                             | £0.23                         | 4.7%               | £0.23                               | £0.07                             | -£0.07                                     | 0.1%   |
| RECOUPMENT ACADEMY | Whetley Primary Academy                           | £5.21  | £4.97                             | £0.23                         | 4.7%               | £0.23                               | £0.07                             | -£0.07                                     | 0.1%   |
| PRIMARY            | Wibsey Primary School                             | £4.96  | £4.70                             | £0.26                         | 5.5%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| RECOUPMENT ACADEMY | Woodlands Primary Academy                         | £4.93  | £4.70                             | £0.22                         | 4.8%               | £0.23                               | £0.07                             | -£0.08                                     | -0.1%  |
| RECOUPMENT ACADEMY | Woodside Academy                                  | £5.02  | £4.76                             | £0.25                         | 5.3%               | £0.23                               | £0.07                             | -£0.05                                     | 0.4%   |
| RECOUPMENT ACADEMY | Worth Valley Primary Academy                      | £5.12  | £4.87                             | £0.26                         | 5.3%               | £0.23                               | £0.07                             | -£0.04                                     | 0.6%   |
| <b>Totals</b>      |   |  |                                   |                               |                    |                                     |                                   |  |  |
|                    |   | <b>Min</b>                                     | <b>£0.18</b>                      | <b>3.4%</b>                   | <b>£0.23</b>       | <b>£0.07</b>                        | <b>-£0.12</b>                     | <b>3.4%</b>                                |  |
|                    |   | <b>Max</b>                                     | <b>£0.30</b>                      | <b>6.6%</b>                   | <b>£0.23</b>       | <b>£0.07</b>                        | <b>£0.00</b>                      | <b>6.6%</b>                                |  |
|                    |   | <b>Median</b>                                  | <b>£0.25</b>                      | <b>5.2%</b>                   | <b>£0.23</b>       | <b>£0.07</b>                        | <b>-£0.05</b>                     | <b>0.5%</b>                                |  |

Please note that Deprivation & SEND rates for individual settings will be re-calculated for 2023/24 using January 2023 census data, when this is available  
The proposed funding rate in 2023/24 for all providers for the delivery of the 2 year old entitlement is £5.61 per hour  
Please be aware that our EYSFF proposals are out for consultation & are subject confirmation.

## 2023/24 Indicative (as proposed) Rates of Funding for Private, Voluntary and Independent Providers - EYSFF 3/ 4 Year Old Entitlement

| Type of Provider                               | 2022/23      |              |              | 2023/24      |              |              | Diff         |               |               |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|
|  | Min          | Median       | Max          | Min          | Median       | Max          | Min          | Median        | Max           |
| Childminder - Universal Base Rate              | £4.39        | £4.39        | £4.39        | £4.46        | £4.46        | £4.46        | £0.07        | £0.07         | £0.07         |
| Childminder - Deprivation & SEND Rate          | £0.26        | £0.26        | £0.90        | £0.23        | £0.23        | £0.80        | -£0.03       | -£0.03        | -£0.10        |
| <b>Childminder - Total Rate</b>                | <b>£4.65</b> | <b>£4.65</b> | <b>£5.29</b> | <b>£4.69</b> | <b>£4.69</b> | <b>£5.26</b> | <b>£0.04</b> | <b>£0.04</b>  | <b>-£0.03</b> |
| Independent - Universal Base Rate              | £4.39        | £4.39        | £4.39        | £4.46        | £4.46        | £4.46        | £0.07        | £0.07         | £0.07         |
| Independent - Deprivation & SEND Rate          | £0.07        | £0.36        | £0.54        | £0.06        | £0.26        | £0.48        | -£0.01       | -£0.10        | -£0.06        |
| <b>Independent - Total Rate</b>                | <b>£4.46</b> | <b>£4.75</b> | <b>£4.93</b> | <b>£4.52</b> | <b>£4.72</b> | <b>£4.94</b> | <b>£0.06</b> | <b>-£0.03</b> | <b>£0.01</b>  |
| Private Pre School - Universal Base Rate       | £4.39        | £4.39        | £4.39        | £4.46        | £4.46        | £4.46        | £0.07        | £0.07         | £0.07         |
| Private Pre School - Deprivation & SEND Rate   | £0.41        | £0.57        | £0.61        | £0.39        | £0.51        | £0.53        | -£0.02       | -£0.06        | -£0.08        |
| <b>Private Pre School - Total Rate</b>         | <b>£4.80</b> | <b>£4.96</b> | <b>£5.00</b> | <b>£4.85</b> | <b>£4.97</b> | <b>£4.99</b> | <b>£0.05</b> | <b>£0.01</b>  | <b>-£0.01</b> |
| Private Day Provider - Universal Base Rate     | £4.39        | £4.39        | £4.39        | £4.46        | £4.46        | £4.46        | £0.07        | £0.07         | £0.07         |
| Private Day Provider - Deprivation & SEND Rate | £0.05        | £0.32        | £0.72        | £0.04        | £0.28        | £0.59        | -£0.01       | -£0.04        | -£0.13        |
| <b>Private Day Provider - Total Rate</b>       | <b>£4.44</b> | <b>£4.71</b> | <b>£5.11</b> | <b>£4.50</b> | <b>£4.74</b> | <b>£5.05</b> | <b>£0.06</b> | <b>£0.03</b>  | <b>-£0.06</b> |
| Voluntary Pre School - Universal Base Rate     | £4.39        | £4.39        | £4.39        | £4.46        | £4.46        | £4.46        | £0.07        | £0.07         | £0.07         |
| Voluntary Pre School - Deprivation & SEND Rate | £0.05        | £0.15        | £0.60        | £0.04        | £0.14        | £0.49        | -£0.01       | -£0.01        | -£0.11        |
| <b>Voluntary Pre School - Total Rate</b>       | <b>£4.44</b> | <b>£4.54</b> | <b>£4.99</b> | <b>£4.50</b> | <b>£4.60</b> | <b>£4.95</b> | <b>£0.06</b> | <b>£0.06</b>  | <b>-£0.04</b> |

Please note that deprivation rates for individual settings will be re-calculated for 2023/24 using January 2023 census data, when this is available

The proposed funding rate in 2023/24 for all providers for the delivery of the 2 year old entitlement is £5.61 per hour

Please be aware of the warning in the consultation document on 2023/24 rates. Our EYSFF proposals are out for consultation & are subject confirmation.

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2023/24 Indicative Analysis - How the 2023/24 DSG High Needs Block Planned Budget has been calculated (estimated) at individual provider level

Document PO Appendix 3

Please note - this does not show indicative allocations that will actually be received by high needs providers

|  |  | 2022/23 FY Planned Budget (January 2022) |                   |                   |                   | 2023/24 FY Indicative Planned Budget (January 2023) |                   |                   |                   | Variances    |                   |                |
|--|--|--|-------------------|-------------------|-------------------|---|-------------------|-------------------|-------------------|--------------|-------------------|----------------|
| Phase  | School / Academy / Setting                                       | Planned                                  | Planned           | Planned           | Total             | Planned   | Indicative        | Indicative        | Total             | Funded       | Total Planned     | Difference     |
|  |  | Funded                                   | Place             | Plus (Top         | Funding           | Funded  | Place             | Plus (Top         | Funding           | Places       | Funding           | in Top Up      |
|  |  | Places                                   | Funding           | Up)               | (exc. Supp)       | Places  | Funding           | Funding           | Funding           | 23/24 vs.    | 23/24 vs. 22/23   | Place 23/24    |
|  |  |  |                   | (exc. Supp)       | (exc. Supp)       |   |                   |                   |                   | 22/23        | 22/23             | vs. 22/23      |
| <b>Maintained Special Schools and Special School Academies</b>   |  |  |                   |                   |                   |   |                   |                   |                   |              |                   |                |
| MAINTAINED   | Beechcliffe School   | 248.00                                   | 2,480,000         | 3,477,616         | 5,957,616         | 248.00  | 2,480,000         | 4,043,823         | 6,523,823         | 0.00         | £566,206          | £2,283         |
| MAINTAINED   | Chellow Heights School   | 250.80                                   | 2,508,000         | 3,378,318         | 5,886,318         | 250.80  | 2,508,000         | 3,463,009         | 5,971,009         | 0.00         | £84,690           | £338           |
| ACADEMY  | Co-op Academy Delius   | 171.00                                   | 1,710,000         | 2,103,930         | 3,813,930         | 171.00  | 1,710,000         | 2,172,751         | 3,882,751         | 0.00         | £68,821           | £402           |
| ACADEMY  | Beckfoot Hazelbeck Academy                                       | 144.00                                   | 1,440,000         | 1,974,045         | 3,414,045         | 144.00  | 1,440,000         | 2,388,894         | 3,828,894         | 0.00         | £414,849          | £2,881         |
| ACADEMY  | High Park School   | 130.00                                   | 1,300,000         | 1,997,549         | 3,297,549         | 130.00  | 1,300,000         | 2,092,289         | 3,392,289         | 0.00         | £94,740           | £729           |
| ACADEMY  | Beckfoot Phoenix School  | 102.00                                   | 1,020,000         | 1,171,531         | 2,191,531         | 102.00  | 1,020,000         | 1,412,503         | 2,432,503         | 0.00         | £240,972          | £2,362         |
| ACADEMY  | Co-op Academy Southfield   | 343.33                                   | 3,433,333         | 4,357,780         | 7,791,114         | 360.00  | 3,600,000         | 4,989,870         | 8,589,870         | 16.67        | £798,757          | £1,168         |
| MAINTAINED   | Oastler School   | 134.00                                   | 1,340,000         | 2,231,813         | 3,571,813         | 134.00  | 1,340,000         | 2,221,231         | 3,561,231         | 0.00         | -£10,583          | -£79           |
| <b>TOTAL MAINTAINED SPECIAL SCHOOLS &amp; SPECIAL SCHOOL ACADEMIES</b>   |  | <b>1,523.13</b>                          | <b>15,231,333</b> | <b>20,692,583</b> | <b>35,923,916</b> | <b>1,539.80</b>                                     | <b>15,398,000</b> | <b>22,784,369</b> | <b>38,182,369</b> | <b>16.67</b> | <b>£2,258,452</b> | <b>£1,211</b>  |
| <b>Primary &amp; Secondary Resourced Provisions - School Led</b>   |  |  |                   |                   |                   |   |                   |                   |                   |              |                   |                |
| PRIMARY MAINTAINED   | Carrwood Primary School  | 12.00                                    | 88,000            | 131,471           | 219,471           | 12.00   | 84,000            | 121,122           | 205,122           | 0.00         | -£14,348          | -£862          |
| PRIMARY ACADEMY  | Denholme Primary School  | 8.00                                     | 56,000            | 116,188           | 172,188           | 8.00  | 48,000            | 104,909           | 152,909           | 0.00         | -£19,280          | -£1,410        |
| PRIMARY ACADEMY  | Green Lane Primary School  | 24.00                                    | 164,000           | 184,095           | 348,095           | 24.00   | 152,000           | 159,476           | 311,476           | 0.00         | -£36,619          | -£1,026        |
| PRIMARY ACADEMY  | High Craggs Primary School                                       | 6.00                                     | 36,000            | 74,816            | 110,816           | 6.00  | 40,000            | 73,148            | 113,148           | 0.00         | £2,332            | -£278          |
| PRIMARY MAINTAINED   | Crossflatts Primary School                                       | 16.00                                    | 100,000           | 189,543           | 289,543           | 16.00   | 96,000            | 183,108           | 279,108           | 0.00         | -£10,435          | -£402          |
| SECONDARY ACADEMY  | Beckfoot Academy   | 6.00                                     | 44,000            | 78,030            | 122,030           | 6.00  | 36,000            | 81,933            | 117,933           | 0.00         | -£4,097           | £651           |
| SECONDARY ACADEMY  | Oasis Academy Lister Park  | 17.67                                    | 142,000           | 149,185           | 291,185           | 16.00   | 104,000           | 130,443           | 234,443           | -1.67        | -£56,742          | -£292          |
| SECONDARY ACADEMY  | Co-op Academy Grange   | 19.00                                    | 138,000           | 215,655           | 353,655           | 24.00   | 172,000           | 219,273           | 391,273           | 5.00         | £37,618           | -£2,214        |
| SECONDARY MAINTAINED   | Parkside School  | 14.00                                    | 84,000            | 194,183           | 278,183           | 14.00   | 88,000            | 174,824           | 262,824           | 0.00         | -£15,359          | -£1,383        |
| SECONDARY ACADEMY  | The Holy Family Catholic School                                  | 20.00                                    | 144,000           | 216,369           | 360,369           | 20.00   | 124,000           | 176,257           | 300,257           | 0.00         | -£60,112          | -£2,006        |
| SECONDARY ACADEMY  | Beckfoot Thornton Academy  | 16.00                                    | 100,000           | 119,492           | 219,492           | 16.00   | 96,000            | 109,118           | 205,118           | 0.00         | -£14,375          | -£648          |
| SECONDARY MAINTAINED   | Titus Salt School  | 30.00                                    | 180,000           | 298,942           | 478,942           | 30.00   | 180,000           | 296,493           | 476,493           | 0.00         | -£2,449           | -£82           |
| SECONDARY ACADEMY  | Bradford Academy   | 27.00                                    | 178,000           | 193,207           | 371,207           | 27.00   | 162,000           | 254,704           | 416,704           | 0.00         | £45,496           | £2,278         |
| SECONDARY ACADEMY  | Bradford Forster Academy   | 10.00                                    | 84,000            | 71,311            | 155,311           | 5.33  | 60,000            | 20,565            | 80,565            | -4.67        | -£74,746          | -£3,275        |
| PRIMARY ACADEMY  | Haworth Primary Academy  | 12.00                                    | 88,000            | 187,998           | 275,998           | 12.00   | 84,000            | 134,605           | 218,605           | 0.00         | -£57,394          | -£4,449        |
| PRIMARY ACADEMY  | Crossley Hall Primary School                                     | 24.00                                    | 156,000           | 225,536           | 381,536           | 24.00   | 164,000           | 215,185           | 379,185           | 0.00         | -£2,351           | -£431          |
| PRIMARY MAINTAINED   | Long Lee Primary School  | 16.00                                    | 116,000           | 192,417           | 308,417           | 16.00   | 124,000           | 175,399           | 299,399           | 0.00         | -£9,017           | -£1,064        |
| PRIMARY MAINTAINED   | Cottingley Village Primary School                                | 13.50                                    | 115,000           | 196,794           | 311,794           | 16.00   | 136,000           | 178,951           | 314,951           | 2.50         | £3,157            | -£3,393        |
| PRIMARY ACADEMY  | Worth Valley Primary   | 8.00                                     | 80,000            | 103,909           | 183,909           | 8.00  | 56,000            | 114,628           | 170,628           | 0.00         | -£13,281          | £1,340         |
| PRIMARY ACADEMY  | Parkwood Primary Academy   | 12.00                                    | 88,000            | 124,619           | 212,619           | 12.00   | 80,000            | 145,750           | 225,750           | 0.00         | £13,131           | £1,761         |
| PRIMARY ACADEMY  | Horton Park Primary  | 12.00                                    | 88,000            | 101,319           | 189,319           | 12.00   | 72,000            | 114,633           | 186,633           | 0.00         | -£2,686           | £1,110         |
| SECONDARY ACADEMY  | Ilkley Grammar School  | 16.67                                    | 118,667           | 181,891           | 300,558           | 22.33   | 158,000           | 241,661           | 399,661           | 5.67         | £99,104           | -£93           |
| PRIMARY ACADEMY  | Holybrook Primary School   | 16                                       | 128,000           | 178,570           | 306,570           | 16.00   | 104,000           | 250,380           | 354,380           | 0.00         | £47,810           | £4,488         |
| <b>TOTAL PRIMARY &amp; SECONDARY RESOURCED PROVISIONS - SCHOOL LED</b>   |  | <b>355.83</b>                            | <b>2,515,667</b>  | <b>3,725,540</b>  | <b>6,241,206</b>  | <b>362.67</b>                                       | <b>2,420,000</b>  | <b>3,676,565</b>  | <b>6,096,565</b>  | <b>6.83</b>  | <b>-£144,642</b>  | <b>-£332</b>   |
| <b>Primary &amp; Secondary Resourced Provisions - LA Led (Sensory)</b>   |  |  |                   |                   |                   |   |                   |                   |                   |              |                   |                |
| PRIMARY MAINTAINED   | Girlington Primary School  | 20.00                                    | 124,265           | 391,680           | 515,945           | 20.00   | 120,000           | 415,181           | 535,181           | 0.00         | £19,236           | £1,175         |
| PRIMARY MAINTAINED   | Swain House Primary School                                       | 20.00                                    | 145,590           | 391,680           | 537,270           | 20.00   | 142,025           | 415,181           | 557,206           | 0.00         | £19,936           | £1,175         |
| PRIMARY ACADEMY  | Grove House Primary School                                       | 12.00                                    | 84,795            | 254,208           | 339,003           | 12.00   | 80,810            | 268,308           | 349,118           | 0.00         | £10,115           | £1,175         |
| SECONDARY ACADEMY  | Hanson School  | 48.00                                    | 332,200           | 920,832           | 1,253,032         | 48.00   | 333,720           | 977,234           | 1,310,954         | 0.00         | £57,922           | £1,175         |
| <b>TOTAL PRIMARY &amp; SECONDARY RESOURCED PROVISIONS LA LED (SENSORY)</b>                                       |  | <b>100.00</b>                            | <b>686,850</b>    | <b>1,958,400</b>  | <b>2,645,250</b>  | <b>100.00</b>                                       | <b>676,555</b>    | <b>2,075,904</b>  | <b>2,752,459</b>  | <b>0.00</b>  | <b>£107,209</b>   | <b>£1,175</b>  |
| <b>Primary &amp; Secondary Resourced Provisions - LA Led (SEMH &amp; ASD)</b>                                    |  |  |                   |                   |                   |   |                   |                   |                   |              |                   |                |
| ALL  | Budget Provision for Element 1 Cost to host                      |  | 410,210           |                   | 410,210           |   | 517,315           |                   | 517,315           |              | £107,105          |                |
| ALL  | Budget Provision for Element 2 Cost (£6,000) to Council          | 136.00                                   | 816,000           |                   | 816,000           | 172.00  | 1,032,000         |                   | 1,032,000         | 36.00        | £216,000          |                |
| ALL  | Budget Provision for Element 3 Cost (EHCP Model) to Council      |  |                   | 1,753,832         | 1,753,832         |   |                   | 1,972,359         | 1,972,359         |              | £218,527          |                |
| <b>TOTAL PRIMARY &amp; SECONDARY RESOURCED PROVISIONS LA LED (newly established)</b>                             |  | <b>136.00</b>                            | <b>1,226,210</b>  | <b>1,753,832</b>  | <b>2,980,042</b>  | <b>172.00</b>                                       | <b>1,549,315</b>  | <b>1,972,359</b>  | <b>3,521,674</b>  | <b>36.00</b> | <b>£541,632</b>   | <b>-£1,429</b> |
| <b>Pupil Referral Units (PRU), Alternative Provision Academies &amp; Alternative Providers</b>                   |  |  |                   |                   |                   |   |                   |                   |                   |              |                   |                |
| MAINTAINED PRU   | Park Aspire  | 90.00                                    | 900,000           | 1,229,841         | 2,129,841         | 90.00   | 900,000           | 1,388,732         | 2,288,732         | 0.00         | £158,891          | £1,765         |
| ALTERNATIVE PROVISION ACADEMY  | Bradford Alternative Provision Academy                           | 65.00                                    | 650,000           | 888,218           | 1,538,218         | 65.00   | 650,000           | 1,002,973         | 1,652,973         | 0.00         | £114,754          | £1,765         |
| Other Providers  | Other Alternative Provision                                      | 10.00                                    | 100,000           | 150,000           | 250,000           | 10.00   | 100,000           | 25,000            | 125,000           | 0.00         | -£125,000         | -£12,500       |
| <b>TOTAL PRUs &amp; ALTERNATIVE PROVIDERS</b>  |  | <b>165.00</b>                            | <b>1,650,000</b>  | <b>2,268,059</b>  | <b>3,918,059</b>  | <b>165.00</b>                                       | <b>1,650,000</b>  | <b>2,416,704</b>  | <b>4,066,704</b>  | <b>0.00</b>  | <b>£148,645</b>   | <b>£901</b>    |
| <b>Education in Hospital / Medical Provision, incorporating the newly established LA Central Managed Service</b> |  |  |                   |                   |                   |   |                   |                   |                   |              |                   |                |
| LA MANAGED SERVICE   | LA Managed Service EinH & Medical Home Tuition (notional places) | 49.00                                    | 1,493,200         |                   | 1,493,200         | 49.00   | 1,583,000         |                   | 1,583,000         | 0.00         | £89,800           | £1,833         |
| <b>TOTAL EDUCATION IN HOSPITAL / TRACKS</b>  |  | <b>49.00</b>                             | <b>1,493,200</b>  | <b>0</b>          | <b>1,493,200</b>  | <b>49.00</b>  | <b>1,583,000</b>  | <b>0</b>          | <b>1,583,000</b>  | <b>0.00</b>  | <b>£89,800</b>    | <b>£1,833</b>  |

Early Years Resourced Provisions - School Led

Please note - this does not show indicative allocations that will actually be received by high needs providers

2022/23 FY Planned Budget (January 2022)

2023/24 FY Indicative Planned Budget (January 2023)

Variances

| Phase   | School / Academy / Setting   | 2022/23 FY Planned Budget (January 2022) |                       |   |                                   | 2023/24 FY Indicative Planned Budget (January 2023) |                                  |  |                                  | Variances                                |  |  |
|---|--|--|-----------------------|---|-----------------------------------|---|----------------------------------|--|----------------------------------|--|--|--|
|   |  | Planned Funded Places                    | Planned Place Funding | Planned Plus (Top Up) Funding (exc. Supp) | Total Planned Funding (exc. Supp) | Planned Funded Places                               | Indicative Planned Place Funding | Indicative Planned Plus (Top Up) Funding | Total Indicative Planned Funding | Funded Places Difference 23/24 vs. 22/23 | Total Planned Funding Difference 23/24 vs. 22/23 | Difference in Top Up Funding Per Place 23/24 vs. 22/23 |
| Early Years Resourced Provision               | Abbey Green Nursery School   | 6.00                                     | 36,000                | 93,910                                    | 129,910                           | 6.00  | 36,000                           | 97,400                                   | 133,400                          | 0.00                                     | £3,490   | £582   |
| Early Years Resourced Provision               | Canterbury Nursery School and Children's Centre                                  | 16.80                                    | 100,800               | 173,365                                   | 274,165                           | 16.80   | 100,800                          | 194,710                                  | 295,510                          | 0.00                                     | £21,345  | £1,271   |
| Early Years Resourced Provision               | Hirst Wood Nursery School  |  |                       |   | 0                                 | 6.00  | 36,000                           | 92,464                                   | 128,464                          | 6.00                                     | £128,464   |  |
| Early Years Resourced Provision               | Midland Road Nursery School  | 6.00                                     | 36,000                | 93,910                                    | 129,910                           | 6.00  | 36,000                           | 97,400                                   | 133,400                          | 0.00                                     | £3,490   | £582   |
| Early Years Resourced Provision               | St Edmund's Nursery School and Children's Centre                                 | 19.80                                    | 118,800               | 194,331                                   | 313,131                           | 19.80   | 118,800                          | 209,538                                  | 328,338                          | 0.00                                     | £15,207  | £768   |
| Early Years Resourced Provision               | Strong Close Nursery School  | 18.00                                    | 108,000               | 181,751                                   | 289,751                           | 18.00   | 108,000                          | 188,795                                  | 296,795                          | 0.00                                     | £7,044   | £391   |
| Early Years Resourced Provision               | Flex in places to 30 hours   | 11.40                                    | 68,400                | 301,867                                   | 370,267                           | 5.40  | 32,400                           | 301,695                                  | 334,095                          | -6.00                                    | -£36,172   | £29,390  |
| <b>TOTAL EARLY YEARS RESOURCED PROVISIONS</b> |  | <b>78.00</b>                             | <b>468,000</b>        | <b>1,039,134</b>                          | <b>1,507,134</b>                  | <b>78.00</b>  | <b>468,000</b>                   | <b>1,182,000</b>                         | <b>1,650,000</b>                 | <b>0.00</b>                              | <b>£142,867</b>                                  | <b>£1,832</b>  |
| <b>Further Education Settings</b>             |  |  |                       |   |                                   |   |                                  |  |                                  |  |  |  |
| FURTHER EDUCATION                             | Bradford College   | 206.67                                   | 1,240,000             |   | 1,240,000                         | 265.33  | 1,592,000                        |  | 1,592,000                        | 58.67                                    | £352,000   |  |
| FURTHER EDUCATION                             | Shipley College  | 140.33                                   | 842,000               |   | 842,000                           | 158.67  | 952,000                          |  | 952,000                          | 18.33                                    | £110,000   |  |
| FURTHER EDUCATION                             | Aspire-Igen  | 36.00                                    | 216,000               |   | 216,000                           | 36.00   | 216,000                          |  | 216,000                          | 0.00                                     | £0   |  |
| FURTHER EDUCATION                             | Estimated Place Element for other Post 16 Provisions                             | 20.00                                    | 120,000               |   | 120,000                           | 3.33  | 20,000                           |  | 20,000                           | -16.67                                   | -£100,000  |  |
| FURTHER EDUCATION                             | Top Up (Plus Element) Funding for All FE Providers including OLA                 |  |                       | 5,300,000                                 | 5,300,000                         |   |                                  | 6,228,000                                | 6,228,000                        |  | 928,000  |  |
| <b>TOTAL FURTHER EDUCATION</b>                |  | <b>403.00</b>                            | <b>2,418,000</b>      | <b>5,300,000</b>                          | <b>7,718,000</b>                  | <b>463.33</b>                                       | <b>2,780,000</b>                 | <b>6,228,000</b>                         | <b>9,008,000</b>                 | <b>60.33</b>                             | <b>£1,290,000</b>                                |  |
| <b>ACROSS SPECIALIST PROVIDERS</b>            |  |  |                       |   |                                   |   |                                  |  |                                  |  |  |  |
|   | Budget for Additional Places under development (to go through statutory process) | 70.00                                    | 700,000               | 1,120,000                                 | 1,820,000                         | 138.33  | 1,383,333                        | 2,025,333                                | 3,408,667                        | 68.33                                    | 1,588,667  |  |
| SPECIAL SCHOOLS, SCHOOL-LED RP & AP           | Teacher Pay and Pensions Grants (delegated high needs)                           |  |                       | 1,627,769                                 | 1,627,769                         |   |                                  | 1,539,732                                | 1,539,732                        |  | -88,037  |  |
| SPECIAL SCHOOLS & PRUS / AP                   | Additional 3.4% Per Place Funding (estimated) attached to the £4.76m             |  |                       |   | 0                                 |   |                                  | 1,392,986                                | 1,392,986                        |  | 1,392,986  |  |
| ACROSS SPECIALIST PROVIDERS                   | Budget Provision for Additional EHCP Banding Model Cost (Stacking)               |  |                       | 1,000,000                                 | 1,000,000                         |   |                                  | 0  | 0                                |  | -1,000,000                                       |  |
| ACROSS MAINSTREAM                             | EHCPs in mainstream schools & academies and Early Years PVI                      |  |                       | 11,056,000                                | 11,056,000                        |   |                                  | 16,104,000                               | 16,104,000                       |  | 5,048,000  |  |
| ACROSS P&S MAINSTREAM                         | SEND Funding Floor mainstream primary & secondary schools & academies            |  |                       | 1,865,000                                 | 1,865,000                         |   |                                  | 2,650,000                                | 2,650,000                        |  | 785,000  |  |
| OTHER   | Out of Authority / Independent / NMSS Placements                                 |  |                       | 14,750,000                                | 14,750,000                        |   |                                  | 21,750,000                               | 21,750,000                       |  | 7,000,000  |  |
| <b>Totals</b>                                 |  | <b>2,879.97</b>                          |                       |   | <b>94,545,577</b>                 | <b>3,068.13</b>                                     |                                  |  | <b>113,706,155</b>               |  | <b>19,160,579</b>                                |  |

| Value of Pre 16 Top Up Rates & Post 16 Top up rates for Non-FE Provision | 2022/23 | 2023/24 | Difference | % Difference |
|--|---------|---------|------------|--------------|
| Band 3L at April 2023 £APP   | £2,236  | £2,318  | £82        | 3.68%        |
| Band 3M at April 2023 £APP   | £4,036  | £4,136  | £100       | 2.49%        |
| Band 3H at April 2023 £APP   | £5,783  | £5,900  | £118       | 2.04%        |
| Band 4L at April 2023 £APP   | £9,218  | £9,411  | £192       | 2.08%        |
| Band 4M at April 2023 £APP   | £13,270 | £13,524 | £254       | 1.91%        |
| Band 4H at April 2023 £APP   | £17,377 | £17,678 | £301       | 1.73%        |
| Protected 7 at April 2023 £APP   | £28,553 | £29,048 | £495       | 1.73%        |

LA Name: Bradford  
 LA Number: 380

| Primary minimum per pupil funding level | Secondary (KS3 only) minimum per pupil funding level | Secondary (KS4 only) minimum per pupil funding level | Secondary minimum per pupil funding level |
|---|--|--|---|
| £4,405.00                               | £5,503.00  | £6,033.00  | £5,715.00                                 |

| Disappication number where alternative MPPF values are used |
|---|
|   |

**Pupil Led Factors**

| 1) Basic Entitlement<br>Age Weighted Pupil Unit (AWPU) | Reception uplift                                     | No                       | Pupil Units  |                                    | 0.00  | Total        | Proportion of total pre MFG funding (%) | Notional SEN (%)                        |                            |                            |
|--|--|--------------------------|--|------------------------------------|---|--------------|---|---|----------------------------|----------------------------|
|  | Description  | Amount per pupil         |  | Pupil Units                        | Sub Total   |              |   | Primary Notional SEN (%)                | Secondary Notional SEN (%) |                            |
| Primary (Years R-6)                                    |  | £3,394.54                |  | 53,215.00                          | £180,640,608  | £360,564,492 | 35.51%                                  | 6.50%                                   |                            |                            |
|  | Key Stage 3 (Years 7-9)                              | £4,785.77                |  | 21,771.00                          | £104,190,903  |              |   | 20.48%                                  | 4.00%                      |                            |
|  | Key Stage 4 (Years 10-11)                            | £5,393.86                |  | 14,040.58                          | £75,732,981   |              |   | 14.89%                                  | 4.00%                      |                            |
| 2) Deprivation   | Description  | Primary amount per pupil | Secondary amount per pupil                           | Eligible proportion of primary NOR | Eligible proportion of secondary NOR                          | Sub Total    | Total                                   | Proportion of total pre MFG funding (%) | Primary Notional SEN (%)   | Secondary Notional SEN (%) |
|  | FSM  | £480.08                  | £480.08  | 15,130.00                          | 11,074.89   | £12,580,359  | £64,934,715                             | 12.77%                                  | 25.00%                     | 25.00%                     |
|  | FSM6   | £705.11                  | £1,030.16  | 15,646.00                          | 12,607.74   | £24,020,246  |   |   | 25.00%                     | 25.00%                     |
|  | IDACI Band F   | £230.04                  | £335.05  | 7,094.54                           | 5,104.16  | £3,342,175   |   |   | 25.00%                     | 25.00%                     |
|  | IDACI Band E   | £280.04                  | £445.07  | 9,593.05                           | 6,786.60  | £5,707,005   |   |   | 25.00%                     | 25.00%                     |
|  | IDACI Band D   | £440.07                  | £620.10  | 5,869.22                           | 4,149.69  | £5,156,090   |   |   | 25.00%                     | 25.00%                     |
|  | IDACI Band C   | £480.08                  | £680.11  | 6,002.73                           | 4,035.52  | £5,626,368   |   |   | 25.00%                     | 25.00%                     |
|  | IDACI Band B   | £510.08                  | £730.12  | 5,618.00                           | 3,806.92  | £5,645,133   |   |   | 25.00%                     | 25.00%                     |
| IDACI Band A   | £670.11  | £930.15                  | 2,232.95   | 1,463.23                           | £2,857,339  | 25.00%       |   |   | 25.00%                     |                            |
| 4) English as an Additional Language (EAL)             | Description  | Primary amount per pupil | Secondary amount per pupil                           | Eligible proportion of primary NOR | Eligible proportion of secondary NOR                          | Sub Total    | Total                                   | Proportion of total pre MFG funding (%) | Primary Notional SEN (%)   | Secondary Notional SEN (%) |
|  | EAL 3 Primary  | £580.09                  |  | 10,141.74                          |   | £5,883,151   | £7,906,644                              | 1.45%                                   |                            |                            |
| EAL 3 Secondary  |  | £1,565.25                |  |                                    | 939.93  | £1,471,222   |   |   |                            |                            |
| 5) Mobility  | Pupils starting school outside of normal entry dates | £945.15                  | £1,360.22  | 494.48                             | 62.42   | £552,271     |   | 0.11%                                   |                            |                            |
| 6) Low prior attainment                                | Description  | Weighting                | Amount per pupil (primary or secondary respectively) | Percentage of eligible pupils      | Eligible proportion of primary and secondary NOR respectively | Sub Total    | Total                                   | Proportion of total pre MFG funding (%) | Primary Notional SEN (%)   | Secondary Notional SEN (%) |
|  | Primary low prior attainment                         |                          | £1,155.18  | 32.97%                             | 17,547.31   | £20,270,383  | £35,813,299                             | 7.04%                                   | 100.00%                    |                            |
|  | Secondary low prior attainment (year 7)              | 54.47%                   |  | 24.53%                             | 8,880.25  | £15,542,916  |   |   |                            |                            |
|  | Secondary low prior attainment (year 8)              | 64.53%                   | £1,750.28  | 24.62%                             |   |              |   |   |                            |                            |
|  | Secondary low prior attainment (year 9)              | 64.53%                   |  | 24.56%                             |   |              |   |   |                            |                            |
|  | Secondary low prior attainment (year 10)             | 64.53%                   |  | 24.64%                             |   |              |   |   |                            |                            |
| Secondary low prior attainment (year 11)               | 63.59%   | 25.67%                   |  |                                    |   |              |   |   |                            |                            |

**Other Factors**

| Factor   | Lump Sum per Primary School (£) | Lump Sum per Secondary School (£)                       | Lump Sum per Middle School (£) | Lump Sum per All-through School (£) | Total (£)   | Proportion of total pre MFG funding (%)                | Notional SEN (%) |       |  |
|--|---------------------------------|---|--------------------------------|-------------------------------------|-------------|--|------------------|-------|--|
| 7) Lump Sum  | £128,020.48                     | £128,020.48   |                                |                                     | £24,451,912 | 4.81%  |                  |       |  |
| 8) Sparsity factor   | £56,309.01                      | £81,913.10  |                                |                                     | £0          | 0.00%  |                  |       |  |
| Rows 45 to 48 are populated with the NFF methodology, please leave this as is if you wish to follow the NFF. As per the Operational Guidance, the distance thresholds can be increased or the year group size thresholds decreased and the distance threshold taper is optional. An alternative method of allocation to the NFF's average year group size taper can be chosen: the continuous taper (Tapered) or fixed sum (Fixed). Examples of each are provided in the Operational Guidance. |                                 |   |                                |                                     |             |  |                  |       |  |
| Primary distance threshold (miles)   | 2.00                            | Primary pupil number average year group threshold       | 21.40                          | Apply primary distance taper        | Yes         | NFF, tapered or fixed sparsity primary lump sum?       | NFF              |       |  |
| Secondary distance threshold (miles)   | 3.00                            | Secondary pupil number average year group threshold     | 120.00                         | Apply secondary distance taper      | Yes         | NFF, tapered or fixed sparsity secondary lump sum?     | NFF              |       |  |
| Middle schools distance threshold (miles)  | 2.00                            | Middle school pupil number average year group threshold | 69.20                          | Apply middle school distance taper  | Yes         | NFF, tapered or fixed sparsity middle school lump sum? | NFF              |       |  |
| All-through schools distance threshold (miles)   | 2.00                            | All-through pupil number average year group threshold   | 62.50                          | Apply all-through distance taper    | Yes         | NFF, tapered or fixed sparsity all through lump sum?   | NFF              |       |  |
| 9) Fringe Payments   |                                 |   |                                |                                     | £0          | 0.00%  |                  |       |  |
| 10) Split Sites  |                                 |   |                                |                                     | £439,760    | 0.09%  |                  |       |  |
| 11) Rates  |                                 |   |                                |                                     | £4,135,811  | 0.81%  |                  |       |  |
| 12) PFI funding  |                                 |   |                                |                                     | £8,002,943  | 1.57%  |                  |       |  |
| 13) Exceptional circumstances (can only be used with prior agreement of ESFA)  |                                 |   |                                |                                     |             |  |                  |       |  |
| Circumstance   |                                 |   |                                |                                     | Total (£)   | Proportion of total pre MFG funding (%)                | Notional SEN (%) |       |  |
| Additional lump sum for schools amalgamated during FY22-23   |                                 |   |                                |                                     | £0          | 0.00%  | 0.00%            | 0.00% |  |
| Additional sparsity lump sum for small schools   |                                 |   |                                |                                     | £0          | 0.00%  |                  |       |  |
| Exceptional Circumstance3  |                                 |   |                                |                                     | £0          | 0.00%  |                  |       |  |
| Exceptional Circumstance4  |                                 |   |                                |                                     | £0          | 0.00%  |                  |       |  |
| Exceptional Circumstance5  |                                 |   |                                |                                     | £0          | 0.00%  |                  |       |  |
| Exceptional Circumstance6  |                                 |   |                                |                                     | £0          | 0.00%  |                  |       |  |

|   |                     |                                |                    |
|---|---------------------|--------------------------------|--------------------|
| Exceptional Circumstance <sup>7</sup>   | £0                  | 0.00%                          |                    |
| <b>Total Funding for Schools Block Formula (excluding minimum per pupil funding level and MFG Funding Total)</b>                          | <b>£506,249,575</b> | <b>99.53%</b>                  |                    |
| 14) Additional funding to meet minimum per pupil funding level  | £2,386,741          | 0.47%                          | 48.00%             |
| <b>Total Funding for Schools Block Formula (excluding MFG Funding Total)</b>  | <b>£508,636,317</b> | <b>100.00%</b>                 |                    |
| 15) Minimum Funding Guarantee   | 0.50%               | £1,733,007                     |                    |
| Where a value less than 0% or greater than 0.5% has been entered please provide the disapplication reference number authorising the value |                     |                                |                    |
| Apply capping and scaling factors? (gains may be capped above a specific ceiling and/or scaled)   |                     | No                             |                    |
| Capping Factor (%)  |                     | Scaling Factor (%)             |                    |
| Total deduction if capping and scaling factors are applied  |                     | £0                             |                    |
|   | Total (£)           | Proportion of Total funding(%) | Notional SEN (%)   |
| MFG Net Total Funding (MFG + deduction from capping and scaling)  | £1,733,007          | 0.34%                          |                    |
| <b>Total Funding for Schools Block Formula</b>  | <b>£510,369,324</b> |                                | <b>£72,131,209</b> |
| High Needs threshold (only fill in if, exceptionally, a high needs threshold different from £6,000 has been approved)                     |                     |                                |                    |
| Additional funding from the high needs budget   | £2,650,000.00       |                                |                    |
| Growth fund (if applicable)   | £796,883.50         |                                |                    |
| Falling rolls fund (if applicable)  | £0.00               |                                |                    |
| Other Adjustment to 22-23 Budget Shares   | £10,517             |                                |                    |
| <b>Total Funding For Schools Block Formula (including growth and falling rolls funding)</b>   | <b>£511,176,725</b> |                                |                    |
| <b>% Distributed through Basic Entitlement</b>  | <b>70.89%</b>       |                                |                    |
| <b>% Pupil Led Funding</b>  | <b>92.25%</b>       |                                |                    |
| <b>Primary: Secondary Ratio</b>   | <b>1 :</b>          | <b>1.37</b>                    |                    |
| 23-24 NFF NNDR allocation   | £3,738,985          |                                |                    |
| <b>Total Funding For Schools Block Formula (including growth and falling rolls funding) after deduction of 23-24 NFF NNDR allocation</b>  | <b>£507,437,740</b> |                                |                    |



|  |  |  |  |  |  |  |  |  |  |  |  |  |  |       |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|-------|
| % budget pass-through 3&4 year old EYSFF (excluding one off monies); Must be greater than 95%: |  |  |  |  |  |  |  |  |  |  |  |  |  | 96.7% |
| % spend 3&4 year old EYSFF on supplements - Cannot exceed 12%:                                 |  |  |  |  |  |  |  |  |  |  |  |  |  | 8.8%  |

| 1. EYSFF (3 & 4 year olds):<br>Base rate | Description                                     | Unit Value (£) |                |                       | Unit Applied | Number of Units (Universal) |                |                       | Number of Units (Extended) |                |                       | Anticipated Budget (£) |                |                       |             |
|--|---|----------------|----------------|-----------------------|--------------|-----------------------------|----------------|-----------------------|----------------------------|----------------|-----------------------|------------------------|----------------|-----------------------|-------------|
|  |   | PVI            | Nursery School | Primary Nursery Class |              | PVI                         | Nursery School | Primary Nursery Class | PVI                        | Nursery School | Primary Nursery Class | PVI                    | Nursery School | Primary Nursery Class | TOTAL       |
|  | Universal Base Rate Applicable to all Providers | £4.46          | £4.46          | £4.46                 | per hour     | 3,842,234                   | 351,777        | 904,508               | 1,330,305                  | 75,607         | 217,449               | £23,069,521            | £1,906,135     | £5,003,928            | £29,979,584 |

| 2. EYSFF (3 & 4 year olds):<br>Other formula factors | Description | Unit Value (£) |                |                       | Unit Applied | Number of Units (Universal & Additional 15 hours) |                |                       | Anticipated Budget (£) |                |                       |       |
|--|-------------|----------------|----------------|-----------------------|--------------|---|----------------|-----------------------|------------------------|----------------|-----------------------|-------|
|  |             | PVI            | Nursery School | Primary Nursery Class |              | PVI   | Nursery School | Primary Nursery Class | PVI                    | Nursery School | Primary Nursery Class | TOTAL |

|                         |  |  |                |                       |                       |              |                |                       |                       |                |                       |                       |          |
|-------------------------|--|--|----------------|-----------------------|-----------------------|--------------|----------------|-----------------------|-----------------------|----------------|-----------------------|-----------------------|----------|
| 2.<br>Supplements       | Variable 1<br>Deprivation<br>(Mandatory)   | All providers (variable rate) calculated using a 3 year rolling average of Index of Multiple Deprivation (IMD) scores.                   | PVI            | Nursery School        | Primary Nursery Class | Unit Applied | PVI            | Nursery School        | Primary Nursery Class | PVI            | Nursery School        | Primary Nursery Class | TOTAL    |
|                         |  |  | £0.67          | £0.67                 | £0.67                 |              | per hour       | 1,873,022             | 191,269               | 414,201        | £1,257,606            | £128,424              | £278,107 |
|                         | Variable 2<br>Deprivation<br>(Mandatory)   | Rates include a weighting, to allocate additional funding to providers that have above average levels of deprivation as measured by IMD. | PVI            | Nursery School        | Primary Nursery Class | Unit Applied | PVI            | Nursery School        | Primary Nursery Class | PVI            | Nursery School        | Primary Nursery Class | TOTAL    |
|                         |  |  | £0.15          | £0.15                 | £0.15                 |              | per hour       | 2,520,484             | 293,971               | 571,762        | £387,311              | £45,173               | £87,860  |
| Quality (if applicable) | For eligible providers, to support the cost of the employer's contribution to Teacher Pensions, following the mainstreaming of the TPG and TPENG. Providers are eligible for this Supplement in 2023/24 if they received Teacher Pension Grant funding in 2022/23, or if they evidence to the Authority that they are an employer, that pays the employer's contribution to national Teacher Pensions (which is currently 23.6%), that employs a qualified teacher, who directly delivers the 3&4-year-old early years entitlement (the Early Years Foundation Stage). | PVI  | Nursery School | Primary Nursery Class | Unit Applied          | PVI          | Nursery School | Primary Nursery Class | PVI                   | Nursery School | Primary Nursery Class | TOTAL                 |          |
|                         |  | £0.23  | £0.00          | £0.23                 |                       | per hour     | 1,944,380      | 428,852               | 1,128,779             | £447,207       | £0                    | £259,619              | £706,827 |

Funding provided through supplements: %

| 3. Maintained nursery school (MNS) lump sums | Description   | PVI | Nursery School | Primary Nursery Class | Unit Applied | PVI | Nursery School | Primary Nursery Class | PVI | Nursery School | Primary Nursery Class | TOTAL      |
|--|---|-----|----------------|-----------------------|--------------|-----|----------------|-----------------------|-----|----------------|-----------------------|------------|
|  | 1) Nursery Schools Sustainability Top-Up: this funding tops up the school to a minimum level of funding based on that school's specific circumstances, taking into account premises, rates, insurance, base allocations, mainstreamed grants (including TPG and TPENG). 2) Additional lump sums allocate the MNS Supplement to ensure that the base per hour rate of funding for each nursery school is £6.08 & the deprivation rate is the same as that used in 2022/23 + 1.60%. |     | Variable       |                       | lump sums    |     | 7              |                       |     | £1,472,064     |                       | £1,472,064 |

**TOTAL FUNDING FOR EARLY YEARS SINGLE FUNDING FORMULA (3 & 4 YEAR OLDS): £34,342,956**

| EYSFF (2 year olds) | Description | Unit Value (£) |                |                       | Unit Applied | Number of Units |                |                       | Anticipated Budget (£) |                |                       |       |
|---------------------|-------------|----------------|----------------|-----------------------|--------------|-----------------|----------------|-----------------------|------------------------|----------------|-----------------------|-------|
|                     |             | PVI            | Nursery School | Primary Nursery Class |              | PVI             | Nursery School | Primary Nursery Class | PVI                    | Nursery School | Primary Nursery Class | TOTAL |

|   |   |       |       |       |          |           |         |        |  |  |  |            |          |          |            |
|---|---|-------|-------|-------|----------|-----------|---------|--------|--|--|--|------------|----------|----------|------------|
| 4. Base Rate(s) per hour, per provider type | Universal Base Rate Applicable to all Providers | £5.61 | £5.61 | £5.61 | per hour | 1,147,863 | 118,928 | 71,951 |  |  |  | £6,439,512 | £667,188 | £403,646 | £7,510,346 |
|---|---|-------|-------|-------|----------|-----------|---------|--------|--|--|--|------------|----------|----------|------------|

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TOTAL FUNDING FOR EARLY YEARS SINGLE FUNDING FORMULA (2 YEAR OLDS): £7,510,346

| 5. SEN Inclusion Fund (funded directly to providers)                |                                       | Description   | Anticipated total budget (£) |                |                       |                 |
|---|---------------------------------------|---|------------------------------|----------------|-----------------------|-----------------|
|   |                                       |   | PVI                          | Nursery School | Primary Nursery Class | TOTAL           |
| (a) 3 & 4 Year Olds (Mandatory)                                     | (ai) Funding allocated from EY Block  | Funding for Early Years SEND Inclusion (element 2 replication) - allocated using agreed criteria and method. See Early Years Technical Statement on Bradford Schools Online | £251,695                     | £75,000        | £223,305              | £550,000        |
|   | (aii) Funding allocated from HN Block | EY SEND Inclusion is 100% funded from the Early Years Block   |                              |                |                       |                 |
| (b) 2 Year Olds (if applicable)                                     | (bi) Funding allocated from EY Block  | Funding for Early Years SEND Inclusion (element 2 replication) - allocated using agreed criteria and method. See Early Years Technical Statement on Bradford Schools Online | £66,667                      | £10,000        | £23,333               | £100,000        |
|   | (bii) Funding allocated from HN Block | EY SEND Inclusion is 100% funded from the Early Years Block   |                              |                |                       |                 |
| <b>TOTAL FUNDING FOR SEN INCLUSION FUND (TOP-UP GRANT ELEMENT):</b> |                                       |   |                              |                |                       | <b>£650,000</b> |

| 6. Early years contingency funding                        |  | Description  | Anticipated total budget (£) |  |  |                 |
|---|--|--|------------------------------|--|--|-----------------|
| 3 & 4 Year Olds   |  | no contingencies are held  |                              |  |  | £0              |
| 2 Year Olds   |  | no contingencies are held  |                              |  |  | £0              |
| 7. Early years centrally retained funding                 |  | Description  | Anticipated total budget (£) |  |  |                 |
| 3 & 4 Year Olds   |  | See Document PN Appendix 1 for a breakdown of funds (MNS de-delegated funds access; LA Early Years and EYSFF capacity) |                              |  |  | £649,330        |
| 2 Year Olds   |  | no central funds for 2 year olds are held  |                              |  |  | £0              |
| <b>TOTAL FUNDING FOR EARLY YEARS CENTRAL EXPENDITURE:</b> |  |  |                              |  |  | <b>£649,330</b> |

| 8. Early years pupil premium                        |  | Anticipated total budget (£) |  |  |          |                 |
|---|--|------------------------------|--|--|----------|-----------------|
| 3 & 4 Year Olds                                     |  |                              |  |  | £437,089 |                 |
| <b>TOTAL FUNDING FOR EARLY YEARS PUPIL PREMIUM:</b> |  |                              |  |  |          | <b>£437,089</b> |

| 9. Disability access fund                                    |  | Anticipated total budget (£) |  |  |          |                 |
|--|--|------------------------------|--|--|----------|-----------------|
| 3 & 4 Year Olds  |  |                              |  |  | £120,000 |                 |
| <b>TOTAL FUNDING FOR EARLY YEARS DISABILITY ACCESS FUND:</b> |  |                              |  |  |          | <b>£120,000</b> |

**Adjustment to Special School / Academy and PRU / AP Academy Funding as a result of the December Settlement**

In the DSG settlement for 2023/24, that was announced on 16 December 2022, an additional £400m of High Needs Block funding has been allocated to local authorities. This comes from the additional £2bn for the national schools budget that was announced by the Chancellor on 17 November 2022.

Bradford's share of the £400m is £4.76m. This is allocated into our High Needs Block, mostly for us to use according to local circumstances and pressures. An additional DSG Condition of Grant however, has been established by the DfE. The purpose of the Condition is to require local authorities to pass through to Special Schools, Special School Academies, PRUs and Alternative Provision Academies an additional + 3.4% in funding per place, using a proportion of the £4.76m to do so. The increase is set at 3.4%, as this is the average additional % increase in funding that mainstream primary and secondary schools and academies are receiving via the new Mainstream Schools Additional Grant (MSAG), which was also announced on the 16 December 2022.

The methodology is slightly different for special schools than it is for PRUs / AP, but the purpose is the same – to allocate an additional 3.4% funding per place, in addition to 'normal' core place and top-up funding. This is funding that must be additional to:

- £10,000 place-element funding (the value of which has not changed).
- Top-Up funding (the values of which are set by our EHCP Banded Model and Day Rate Funding Model).
- The continuation of the former Teacher Pay and Pensions Grants.
- The requirements of the Special Schools Minimum Funding Guarantee.

We have estimated the allocations for each eligible school and academy, and we have included the estimated cost within the 2023/24 High Needs Block planned budget. Estimated allocations are shown below:

|   |                  |
|---|------------------|
| Beechcliffe School                      | 217,579          |
| Chellow Heights School                  | 202,407          |
| Co-op Academy Delius                    | 129,793          |
| Beckfoot Hazelbeck Special School       | 119,835          |
| High Park School                        | 122,444          |
| Beckfoot Phoenix Primary Special School | 78,195           |
| Co-op Academy Southfield                | 288,740          |
| Oastler School                          | 119,837          |
| Park Aspire                             | 57,531           |
| Bradford Alternative Provision Academy  | 56,626           |
| <b>Total</b>                            | <b>1,392,986</b> |

We must stress that these are estimates only at this stage. The DfE is to provide some more guidance and data for the calculation of funding for PRUs / AP Academies. The Local Authority is also required to consult with providers on these allocations, and we will do this as soon as possible this term.

For absolute clarity, this is an additional formula funding allocation for each setting, which, although funded within the High Needs Block, does not alter any of the key levers of the national high needs place-plus system e.g. the £10,000 place-element and the £6,000 element 2 figure. There are no direct knock-on system consequences in 2023/24.

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## DSG Management Plan (Updated January 2023)

### Introduction

1. The main purposes of this Plan are to:
  - a. Present the principles that have previously been agreed and which lay the foundations of our Dedicated Schools Grant (DSG) management.
  - b. Summarise the approaches that have been, and are, used in the management of the Schools Block, Early Years Block and Central Schools Services Block, so that financial pressure present within these three blocks does not result in a cumulative deficit in Bradford's DSG account.
  - c. Explain in more detail the approaches that have been, and will be, used for the management of the High Needs Block. This plan provides context for High Needs Block financial decisions. The plan identifies the main risks to the High Needs Block and mitigations. In this context, risk is defined as the accrual of a significant cumulative deficit in our DSG account.
2. Our DSG Management Plan is reviewed and presented to the Schools Forum annually. It was last presented to the Forum on 12 January 2022.
3. **This plan focuses on the High Needs Block**, for the following two reasons:
  - a. Over spends in the High Needs Block are a common reason why local authorities currently are recording cumulative deficits in their DSG accounts. For this reason, the focus of the Education Skills Funding Agency's (ESFA's) Management Plan Tool is the High Needs Block.
  - b. The High Needs Block is *the* major block of the DSG where financial pressure cannot be released fully through the adjustment of formula funding. In the Schools Block, and in the Early Years Block, formula funding can be adjusted downwards to control the overall spending position of the block (albeit that this passes pressure onto the recipients of delegated allocations and is also subject to restrictions e.g. the Minimum Funding Guarantee in the Schools Block, the 5% central retention in the Early Years Block).

Within the High Needs Block however, although the Authority can control spending to an extent, for example through the value it sets for top-up funding for EHCPs and by ensuring a sufficient number of 'local' specialist places (rather than being over-reliant on potentially more expensive out of authority and independent provision), much more of the spending within this block is influenced by volume and growth of demand, which are less controllable. There is greater risk of a deficit crystallising at DSG account level because of this. There are also only limited and potentially difficult options available for recovery from deficit within the High Needs Block.

4. **Attached with this plan is an updated four-year forecast of our High Needs Block (Appendix 2).** This forecast is calculated on various estimates of both income and expenditure. It contains a number of uncertainties. We are conscious of four uncertainties, in particular, which will have direct financial implications for our High Needs Block going forward:
  - a) Whether we are successful in our bid for a Special School Free School. Our forecast currently does not include the on-going revenue cost of a new special school. Where we are successful, we will need to assess

the continuing affordability of our specialist places, including those that we have created in recent years, in part, as a result of not being previously successful in achieving a Free School. Document PH, which was presented on 7 December 2022, provided further information on high needs places sufficiency.

- b) The outcomes of the national reviews on SEND, EHCP and Alternative Provision systems and funding (the SEND Green Paper). It is likely that national changes will alter the cost base that our High Needs Block will need to manage.
- c) The rate of continuing growth in the number of children and young people with EHCPs in Bradford, including the numbers that will require specialist provisions, as well as high cost independent provisions, in the context of wider demographic changes. We are currently experiencing significant growth in these numbers, but for how long will growth (at this rate) continue?
- d) Whether the annual increases in High Needs Block funding allocated by the DfE will keep pace with increasing costs. On current information, assuming no change in EHCP growth rates, we assume that funding is unlikely to keep pace with costs growth. This is because the DfE has previously indicated that it expects EHCP growth rates nationally to slow and that future High Needs Block funding settlements will be calculated on this basis.

5. **Bradford’s DSG account is not forecasted to be cumulatively in deficit at either 31 March 2023 or 31 March 2024.** As such, our management plan at this time is not needed for deficit recovery. Our plan focuses on monitoring the avoidance of a deficit building for the future, and on continuing to secure sufficient high quality provision and support services, whilst delivering value for money.

**Our forecast does currently identify however, that there is clear risk of a cumulative deficit building within our High Needs Block by the end of the 2025/26 financial year, as a result of recurrent structural in-year over spending. The risk of cumulative deficit by the end of the 2026/27 financial year is then high.** This position is different from that which we presented this time last year. Our January 2022 forecast did previously indicate the potential for in-year overspending, but to a much lower extent. To illustrate, a comparison of the in-year over spend within our High Needs Block, forecasted now and forecasted in January 2022, is shown in the table below.

|                       | <b>2023/24</b> | <b>2024/25</b> | <b>2025/26</b> |
|-----------------------|----------------|----------------|----------------|
| Forecast January 2022 | £2.575m        | £4.131m        | £4.889m        |
| Forecast January 2023 | £4.200m        | £10.533m       | £16.013m       |

Please note the January 2023 forecast includes the additional £4.76m High Needs Block funding that the DfE announced in December (funded from the £2bn that was announced by the Chancellor on 17 November). We have assumed that this additional funding is built into the base and continues. For reference, without this additional funding, but also removing the additional £1.393m expenditure that is specifically attached to it, our in year positions (in the January 2023 forecast) would be substantially worse.

Please also note that the January 2023 forecast, whilst still based on various assumptions and estimates, does not include further adjustments or mitigating actions, which would be introduced *specifically* to reduce spending and to manage the deficit position.

6. It is helpful to highlight the differences between the January 2023 vs. January 2022 forecasts for the 2023/24 financial year by spending heading. This gives sight of the main reasons why the forecast has changed (and highlights the main areas of change in financial pressure).

| 2023/24 Financial Year   | Jan 2022       | Jan 2023       | Diff          |
|--|----------------|----------------|---------------|
| High Needs Block Income (from DfE)                                   | £109.109       | £116.884       | £7.775        |
| Place Plus - Maintained Special Schools and Special School Academies | £37.812        | £38.182        | £0.370        |
| <b>Independent &amp; Out of Authority Placements</b>                 | <b>£17.050</b> | <b>£21.750</b> | <b>£4.700</b> |
| <b>Mainstream EHCPs (Pre16) including SEND Floor and PVI EHCPs</b>   | <b>£14.200</b> | <b>£18.604</b> | <b>£4.404</b> |
| <b>Place Plus - EHCPs Post16 in Further Education institutions</b>   | <b>£8.495</b>  | <b>£9.008</b>  | <b>£0.513</b> |
| Place Plus - School-Led Resourced Provisions Primary & Secondary     | £6.739         | £6.097         | -£0.642       |
| Teaching & SEND Support Services                                     | £5.216         | £5.715         | £0.499        |
| Place Plus - New SEND Places not yet allocated                       | £4.750         | £3.409         | -£1.341       |
| Place Plus - PRUs & Alternative Providers                            | £4.075         | £4.067         | -£0.008       |
| Place Plus - Other LA Resourced Provisions                           | £3.099         | £3.522         | £0.423        |
| Place Plus - LA-Led Resourced Provisions - Sensory                   | £2.751         | £2.752         | £0.001        |
| TPG & TPENG special schools, resourced provisions and AP providers   | £1.693         | £1.540         | -£0.153       |
| Place Plus - Early Years Enhanced Provisions                         | £1.567         | £1.650         | £0.083        |
| Medical Home Tuition, Education in Hospital & Tracks Central Service | £1.553         | £1.583         | £0.030        |
| EHCP Banding Model resilience, needs-led growth, stacking            | £1.000         | £0.000         | -£1.000       |
| Building Schools for the Future (PFI) - Special Schools              | £0.858         | £0.917         | £0.059        |
| Speech & Language Therapy Services                                   | £0.322         | £0.328         | £0.006        |
| Mainstream EHCPs (Post16) element 2 cost support                     | £0.311         | £0.150         | -£0.161       |
| Special Schools Inclusion Outreach                                   | £0.000         | £0.240         | £0.240        |
| Specialist Equipment   | £0.120         | £0.100         | -£0.020       |
| Copyright Licences   | £0.074         | £0.073         | -£0.001       |
| Additional Grant to Special / PRUs following the £4.76m funding      | £0.000         | £1.393         | £1.393        |

7. Whilst we have an additional £7.775m in funding in the January 2023 forecast, compared with the January 2022 forecast, which is the result of both the 2023/24 settlement and the additional Supplementary Funding that was allocated by the DfE in 2022/23, we have £9.395m more expenditure in 2023/24 than previously forecast. Whilst there are updates to a number of expenditure headings (some of which are the result of the movement of budget between headings e.g. for cross-over between the provision for new SEND places and spending by type of place-plus provision), the comparison evidences the growth in spending in 3 headings in particular (highlighted in bold in the table above). Together, these 3 headings account for £9.617m of additional expenditure within the January 2023 forecast:
- a. Independent and Out of Authority Placements.
  - b. Mainstream EHCPs, including the SEND Funding Floor and EHCPs in early years PVI settings.
  - c. EHCPs for Post 16 students in Further Education Institutions (including SPIs).
8. In the context of expected, more limited, High Needs Block funding settlements from the DfE, it is the further estimated growth in spending in these 3 areas, over the next four-year period, which mostly explains the substantial downturn in our High Needs Block financial position.
9. **Our forecast identifies at this time that mitigating action will need to be taken in order to prevent the accrual of a cumulative deficit balance within our High Needs Block. This will be a piece of work for the Authority to discuss within the Schools Forum during 2023.**
10. **We have presented to the Schools Forum that we currently forecast to hold £25.830m of surplus balance within the High Needs Block at the end of the 2022/23 financial year.** 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 annual 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.

We currently estimate that we need to earmark an additional £3.280m of the balance to establish a planned budget for the High Needs Block for 2023/24 that balances back to zero. In total, with the addition of the £0.920m, we currently estimate that £4.200m (16% 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. £4.23m 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 growth in the cost of the SEND Funding Floor, are actioned. On this basis, £21.630m of surplus balance would remain at March 2024. Our forecast then indicates that, without mitigating action, this surplus could be exhausted before the end of the 2025/26 financial year.

In this context, the Authority at this time does not plan any other significant use of the High Needs Block surplus. As Forum 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 £25.830m 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 £25.830m balance will be supporting the avoidance of cumulative deficit in the High Needs Block over the medium term.

### **Bradford's DSG Management Principles**

11. We have agreed previously with the Schools Forum the following general management principles, which we still employ and expect to do so going forward:
  - a. We seek to establish annually in January a planned DSG budget for the next financial year that closely balances 'in year'. One off monies (brought forward surplus balances) have then previously been used only to a limited extent and mainly for specific time-limited commitments, or for the purposes of investing in activities or in provision (and changes in provision) that will have benefit in future years, or in preparing for changes to come. We have always sought to avoid setting a planned budget for the next financial year that is dependent on significant savings being made, which are still to be identified. This approach is especially important in circumstances where there isn't a sufficient value of brought forward surplus balance available to provide adequate cover, in the event that such savings are not realised.

We wish to highlight for the Schools Forum that we are taking a different position in respect of the High Needs Block in 2023/24, as our planned budget currently indicates that £4.20m of brought forward balance may be required to be deployed and only £0.920m of this relates to specific targeted additional spending. This means that £3.28m effectively covers on-going expenditure, albeit that the £4.23m additional places budget is not expected to be fully spent in 2023/24 and that the planned budget is constructed prudently on a series of estimates. In order to bring the 2023/24 High Needs Block into balance, without using balances, we would need to implement significant reductions, including in delegated formula funding. It is not realistic (nor justifiable) to propose these at a time of financial pressure on providers and given the size of the surplus balance that we currently hold. However, this approach does mean that the in-year spending pressure that is present in 2023/24 has not been corrected and carries forward into 2024/25.

- b. We adjust our funding formulae, which are used to calculate delegated allocations to schools, academies and early years providers within the Schools Block and the Early Years Block, to produce an 'in year' balanced



planned budget in these two blocks, before we then consider the allocation of any brought forward balances for specific purposes. To provide parity, but subject to affordability, we typically adjust our High Needs Block funding models (our EHCP Banded Model and our Alternative Provision Day Rate Model) with reference to the funding settlement being received by mainstream schools and academies through formula funding within the Schools Block.

- c. We seek to set a realistic but prudent planned budget. A good example of prudence is that we set the High Needs Block planned budget for the next financial year on a 'capacity building basis' – on full year occupancy of all high needs provisions, including newly developing places. This approach aims to ensure that our spending strategy, and the new provisions we develop, can be sustained across the medium to longer terms. Where we are successful in our bid for a new Special School Free School, we will need to assess the continuing affordability of the specialist places that we have created in recent years, partially as a result of not being previously successful in achieving a Free School.
- d. The retention of a 'safety net' reserve (held within surplus brought forward balances) is an important part of our DSG management. This is certainly true for the High Needs Block but, given the fluctuations within the Early Years Block (EYB), we also seek to ensure that there is sufficient surplus brought forward balance retained each year within the EYB so that we can manage unexpected, or higher than expected costs, without needing to reduce the values of Early Years Single Funding Formula (EYSFF) rates for providers to recover in the following financial year.
- e. We initially treat each of the four DSG blocks as ring-fenced, meaning that we manage any financial pressure within a block by adjusting the planned budget for that block, unless there is agreement otherwise to support this pressure by taking contributions from another block. Block transfers are subject to the Finance Regulations.
- f. We expect the Central Schools Services Block (CSSB) commitments to closely match the CSSB allocation each year and for the planned budget to be established on this basis. We do forecast to hold a small surplus balance within the CSSB at the end of the 2022/23 financial year, which we propose to retain within the CSSB to be available to be used to support the services that are funded by the CSSB.
- g. If we over spend the planned budget in any block, meaning that there is a cumulative 'in year' over spend, which is not offset by savings elsewhere within the block, this over spend is retained within the respective block and is managed by adjusting next year's planned budget for that block, in combination with the deployment of any surplus balances (reserves) carried forward within that block.
- h. If we under spend the planned budget in any block, meaning that there is a cumulative 'in year' surplus, which is not offset by over spends elsewhere within the block, this under spend is retained within the respective block and is added to the block's carried forward balance. Although the Regulations permit balances to be used cross-block, we have established a local ring-fencing policy. Balances are only moved between blocks following agreement. Balances held within the Schools Block relating to maintained school de-delegated funds, Growth Fund and Falling Rolls Fund are also ring-fenced for their respective purposes.
- i. 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, meaning that the surplus balance that is forecasted to be held within the CSSB will stay with the CSSB

going forward. 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 transition to the cessation of historic commitments funding.

### **High Needs Block – Planned Budget 2023/24 Construction**

12. The table below shows the proposed 2023/24 High Needs Block planned budget at summary heading level sorted by cash value / percentage of the total budget. These figures are taken from the attached four-year forecast. They also match the figures presented in Document PL.

| <b>Budget Heading</b>  | <b>2023/24 (£m)</b> | <b>%</b> |
|--|---------------------|----------|
| Place Plus - Maintained Special Schools and Special School Academies | £38.182             | 31.5%    |
| Independent & OLA Placements & Education OLAs                        | £21.750             | 18.0%    |
| Mainstream EHCPs (Pre 16) including SEN Funding Floor and PVI EHCPs  | £18.604             | 15.4%    |
| Place Plus - EHCPs Post 16 in Further Education institutions         | £9.008              | 7.4%     |
| Place Plus - School-Led Resourced Provisions Primary & Secondary     | £6.097              | 5.0%     |
| Teaching Support Services  | £5.715              | 4.7%     |
| Place Plus - PRUs & Alternative Providers                            | £4.067              | 3.4%     |
| Place Plus - Other LA Resourced Provisions                           | £3.522              | 2.9%     |
| Place Plus - New SEND Places not yet allocated                       | £3.409              | 2.8%     |
| Place Plus - LA-Led Resourced Provisions - Sensory                   | £2.752              | 2.3%     |
| Place Plus - Early Years Enhanced Provisions                         | £1.650              | 1.4%     |
| Medical Home Tuition, EinH & Tracks Central Service                  | £1.583              | 1.3%     |
| TPG & TPENG special schools, resourced provisions and AP providers   | £1.540              | 1.3%     |
| Grant to Special Schools / Academies & PRUs / AP re. the 3.4%        | £1.393              | 1.2%     |
| BSF (PFI) - Special Schools  | £0.917              | 0.8%     |
| Speech & Language Therapy Services                                   | £0.328              | 0.3%     |
| Special Schools Inclusion Outreach                                   | £0.240              | 0.2%     |
| Mainstream EHCPs (Post 16 element 2 cost)                            | £0.150              | 0.1%     |
| Specialist Equipment   | £0.100              | 0.1%     |
| Copyright Licences   | £0.078              | 0.1%     |

- The top three budget headings (special schools and special school academies; mainstream EHCPs; OLA, independent and non-maintained placements) account for nearly two thirds of the High Needs Block planned budget (65%).
- The top five headings (adding school-led resourced provisions and post-16 EHCPs in Further Education institutions) account for more than three quarters of the High Needs Block planned budget (77%).
- 93% of the High Needs Block planned budget in total is allocated to the cost of places provision. Correspondingly, 7% is allocated to other centrally managed expenditure, of which the most significant spend heading is Teaching Support Services (5%).

13. The table below summarises the number of SEND and Alternative Provision places by type of provision on which the 2023/24 planned budget is proposed to be established. Appendix 1 gives a detailed by-setting list of these places.

| <b>Setting</b>   | <b>22/23<br/>AY<br/>Planned<br/>Budget<br/>Places<br/>(FTE)</b> | <b>23/24<br/>AY<br/>Planned<br/>Budget<br/>Places<br/>(FTE)</b> | <b>Diff<br/>23/24<br/>AY vs.<br/>22/23<br/>AY</b> |
|--|---|---|---|
| <b>Total SEND Places, made up of:</b>                  | <b>2,742.8</b>  | <b>2,918.8</b>  | <b>+ 176</b>                                      |
| Early Years Resourced Provision                        | 78  | 78  | 0   |
| Local Authority-Led Resourced Provisions - Sensory     | 100   | 100   | 0   |
| Special Schools and Special School Academies           | 1,539.8   | 1,539.8   | 0   |
| School-Led Resourced Provisions                        | 365   | 361   | - 4   |
| Local Authority-Led Resourced Provisions (Other)       | 136   | 172   | + 36  |
| Further Education Colleges (Post 16)                   | 404   | 488   | + 84  |
| Additional SEND Places not yet allocated               | 120   | 180   | + 60  |
| <b>Total Alternative Provision Places, made up of:</b> | <b>214</b>  | <b>209</b>  | <b>- 5</b>  |
| PRU, Alternative Provision Academy, AP Provider        | 165   | 160   | - 5   |
| Education in Hospital, Tracks                          | 49  | 49  | 0   |

14. It is helpful to summarise the recent changes and actions that have influenced the shape of our 2023/24 planned budget. We also explain here the key assumptions on which the four-year forecast is calculated.

- a. Bradford District has experienced a significant increase in demand for Special Educational Needs and Disabilities (SEND) provision. We presented our updated analysis of this to the Schools Forum on 7 December 2022 in the annual sufficiency statement (Document PH). The total number of Education, Health and Care Plans (EHCPs) for 0-25 year olds across the Bradford District was recorded as 5,452 on 24 November 2022. This has increased from 4,915 on 26 November 2021, 4,619 recorded in November 2020 and 3,786 recorded in October 2019. This is the total number of EHCPs for which Bradford Local Authority is responsible for, educated in provisions within and outside Bradford. Further statistics, showing EHCP and SEND population growth, are available in the Annex at the back of this report.
- b. Our data evidences clearly 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.

- c. Despite these increases, which are substantial, our overall proportion of children and young people with EHCPs (3.6%), recorded at January 2022, remains lower than the national average (4.0%), with a gap of 0.4%. This gap was 0.3% between January 2019 and January 2021. **This comparison is suggestive that there is still more growth in our EHCPs to come, and with the potential for our future annual growth rate to be higher than national averages.** This potentially is a cause for concern financially, as the DfE is likely to set future High Needs Block settlements based on the national picture, which may not be in keeping with our local position. Within our forecast, presented in Appendix 2, whilst we have assumed a slight slowing down of growth, we have generally assumed the continuation of substantial growth in the numbers of children and young with EHCPs. This is most obviously expressed in the forecasts of spending in our 3 main pressure areas: EHCPs in mainstream settings, EHCPs in Further Education Post 16 settings, and spending on independent and out of authority placements.
- d. The comparison figures in the Annex at the back of this report, for January 2022, indicate that a greater proportion of the EHCP population in Bradford is placed in mainstream settings (nursery, primary and secondary) than national and regional averages. This may indicate that we are closer than the average authority to the DfE's SEND Green Paper priority, which is to more effectively support and increase the inclusion of children and young people with SEND in mainstream provisions. This also indicates our greater use of resourced provision as a model for delivering specialist places. Wider High Needs Block benchmarking does indicate that we have a larger number of resourced provision places attached to mainstream schools and academies.
- e. The Local Authority has created more than 700 additional specialist places across the District in response to the recent growth in the numbers of children and young people requiring specialist provision. During the academic years 2020 to 2021 and 2021 to 2022, the Local Authority created 189 specialist places. The 2023/24 planned budget, and the four-year forecast, incorporate the cost of the delivery of these established places on an on-going basis. The budget and forecast also include provision for an additional 120 places to be created during the 2022/23 academic year and for a further 100 places to be created during the 2023/24 academic year. Our four-year forecast then, at this time, does not build in any further revenue budget for more specialist places after this.

Our current projection is that we will require an additional 100 to 120 specialist places within the 2022/23 academic year, with these places being delivered across both the special school sector and in resourced provisions. Our projections further indicate 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 and independent' placements. 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).

At January 2022, 1.44% of Bradford's school population was recorded in state funded special schools and special school academies. This compares with 1.43% recorded at January 2021. The national average was 1.59% at January 2022 and 1.52% at January 2021. The Yorkshire & Humberside average was 1.39% at January 2022 and 1.32% at January 2021. If Bradford's special school and special school academy population was at the national average of 1.59% at January 2022, we would have recorded a further 155 FTE pupils in our special schools and special school academies at January 2022 (with a total of 1,624 FTE pupils on roll). We are currently funding 1,540 places across maintained special schools and special school academies, with plans to develop more places. Our monitoring shows that we do not have spare capacity remaining in our special schools and special school academies and so the continued development of additional special school places is an important part of our High Needs Block spending strategy.

As reported to the Schools Forum on 7 December, the Local Authority has submitted to the DfE an application for a new Special School Free School. We anticipate that we will know the outcome of this application early in the new year. **Given the potential lead in time for a new school (possibly during 2026/27), if successful, the estimated £4.68m full occupancy full year revenue cost of a new school is not yet brought into our four-year forecast.** Given that the inclusion of this will substantially increase our High Needs Block spending, where we are successful, we will need to assess holistically the continuing affordability of all our specialist places, including those that we have created in recent years, in part, as a result of not being previously successful in achieving a Free School.

- f. The 2023/24 planned budget, and the four-year forecast, include the assumption that the uplift to rates of top-up funding per capita that providers with EHCPs receive will need to be controlled across the medium term.

**One of the mitigating actions that we can take to control High Needs Block spending is to reduce the annual increases in rates of funding allocated by our EHCP Banded and Day Rate funding models. We could also re-shape our funding models, which might include reducing top-up funding rates.** In this work, benchmarking comparisons will be important. Depending on pay award and inflation on-costs, this approach would potentially pass some of the financial pressure from the High Needs Block onto schools, academies and other providers. So this position will need to be carefully considered. We will also need to ensure that we comply with the requirements of the special schools minimum funding guarantee, which is set by the DfE. It is quite clear however, that the priority for our High Needs Block will be responding to the increased cost (of places and provision) that will come from the estimated continued substantial growth in the numbers of children and young people with EHCPs. **On this basis, in the four-year forecast at this time, we have used a figure of 1.5% 'annual creep', meaning that we estimate that the cost of existing places will grow by only 1.5% a year.** This growth will need to incorporate both any uplift in top-up funding per-capita and any increased cost as a result of EHCPs being assessed within higher bands and / or receiving 'stacked' funding. Whilst 1.5% is an estimate, and will be reviewed annually in line with the High Needs Block affordability position, it does realistically indicate that, at the very least, the rate of uplift of provider funding will need to be restricted in order for the High Needs Block to be sustainable at projected income levels i.e. this forecast evidences the lack of flexibility that we will have, where the DfE reduces the annual increases in High Needs Block funding but where our number of EHCPs continues to significantly grow. This lack of flexibility may require us to re-shape our funding models, which might include reducing top-up funding rates. We are also aware that the DfE's SEND Review has proposed that a national EHCP banded funding system be developed. As such, this banded system could substantially change the cost to our High Needs Block, as well as affect the levels of EHCP top-up funding received by schools and other providers. This is currently unknown however, and no assumptions about this are brought into our forecast at this time.

- g. The 2023/24 planned budget, and the four-year forecast, estimate that spend on pupils with EHCPs in mainstream settings will continue to grow broadly at current cash rates (c. £3.5m a year). Our planned budget and forecast continue to include the cost of our SEND Funding Floor, which is proposed to be used for third year in 2023/24, but amended to uplift the qualification threshold from 1% to 3%. The continuation of the SEND Funding Floor (whether it continues, at what level and how it works) from April 2024 will be subject to review, including with reference to the outcomes of the national SEND Review, which may direct changes.
- h. The 2023/24 planned budget, and the four-year forecast, estimate that spend on students with EHCPs at post-16, including in Further Education settings, will grow substantially over the next couple of years as the school population bulge continues to move into post-16.
- i. The 2023/24 planned budget, and the four year forecast, continues to fund PRU / Alternative Provisions to deliver Local Authority commissioned provision for pupils that are permanent excluded. 160 permanent exclusion places are funded on an annual basis. The planned budget at this time going forward continues not to fund school-commissioned alternative provision. **The DfE's SEND Green Paper proposes some substantial changes to the way Alternative Provision is funded, and the role of the PRUs / AP Academies. The possible financial implications of these changes are not yet built into our forecasts. This is an area we will need to review closely as further announcements are made.**
- j. The 2023/24 planned budget, and the four-year forecast, estimate that spend on pupils with EHCPs placed in out of authority, independent and non-maintained provisions will continue to grow broadly at current cash rates (c. £3.5m a year). However, this is a volatile budget and the cost of placements will be affected by a number of factors. Whilst our overall proportion of children and young people placed in independent provisions has not significantly changed in recent years, the cost of placements has substantially increased, including as independent providers adjust their charging for cost increases e.g. energy, pay awards and pensions. The DfE's SEND Green Paper suggested that independent schools could be brought into a national banded funding system. However, the details (and do-ability) of this change are not known and therefore, nothing has been brought into the forecast in response.

**It is clear that control and reduction of spending in this area will be critical to the sustainability of our High Needs Block.** Whilst we would expect to continue to place pupils, where their needs are most effectively met in these provisions, we wish to continue to closely monitor the position to consider a) whether we have, and are continuing to create, a sufficient number of specialist places within Bradford to ensure that we are not overly reliant on independent settings and NMSS for provision that we could deliver ourselves and b) where we have the joint commissioning of placements (between education, social care and health), that the apportionment of their cost between parties is reflective of respective responsibilities thus ensuring, in the case of the education element, that the charge to the High Needs Block is accurate and proportionate.

The Authority has previously entered into a Social Impact Bond, which funds pro-active early support aimed at reducing the likelihood of children and young people who are identified as being 'at risk' of being placed in expensive independent provision. This Bond in particular is a mechanism that the Authority has employed in seeking to control the increase in cost to the Authority's base budget. The High Needs Block currently contributes £0.07m to this Bond annually.

- k. 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 and within the four-year forecast.

- I. The national High Needs Block funding settlement is a significant uncertainty. Within our four-year forecast, we have estimated that we will receive a 4.5% annual increase in per pupil funding from April 2024 on the 2023/24 base. Whilst the DfE has previously advised local authorities to use a figure of 3% for 2024/25, the DfE advised a figure of 5% for 2023/24 (and we received 6.8%, prior to the additional December monies), meaning that we take the view that we are likely to receive a settlement that is higher than the minimum 3% that the DfE may set. We are estimating this at 4.5%, but this is purely our estimate. 1% is worth about £1.5m. In our January 2022 forecast, presented to the Schools Forum this time last year, we estimated that we would continue to receive a 9% increase in High Needs Block funding per pupil (and on this basis we estimated the 'annual creep' at 4%). The reduction in forecasted income growth is one of the key drivers of the change in our updated forecast.

We calculate, from the Autumn 2022 Statement, that the weight of the national schools' budget settlement is already allocated in 2022/23, with a more modest uplift in funding in 2023/24 and more modest again expected in 2024/25. It is also the case that our High Needs Block funding will be lower going forward as a result of a reduction in the school's population, due to demographic trends.

We have not transferred funding from the Schools Block into the High Needs Block since 2019/20. We do not propose to transfer funding from the Schools Block to the High Needs Block in 2023/24 and our four-year forecast also does not include any such transfer.

- m. Finally, in quick summary, in recent years we have delivered structural changes in the following areas, which roll forward within our updated four-year forecast:

We have established and developed SEMH and ASD Local Authority-led resourced provisions, where resourced provision is hosted on school-sites but where staffing is centrally managed.

We have created and further developed Early Years Enhanced Specialist Provision (school-led resourced provisions), now attached to seven of our maintained nursery schools.

We have restructured our PRU / Alternative Provisions to deliver Local Authority commissioned provision for pupils permanent excluded. The planned budget going forward continues not to fund school-commissioned alternative provision.

The 2023/24 planned budget continues to incorporate the financial efficiencies that have come from the completion of the amalgamation of Bradford's hospital education, Tracks and medical home tuition provisions into a single Local Authority managed service. The DfE has not yet developed a national formula-based approach to the funding of these provisions, and continues to fund local authorities, through the High Needs Block, on historic information. As such, we receive £2.196m of funding in 2023/24, which is greater than our £1.583m estimated planned budget spending. This currently therefore, is an area of 'gain' for us within the High Needs Block, with this gain supporting other High Needs Block expenditure. However, if and when the DfE alters the national funding methodology, this gain may no longer be present and the loss of this will increase the financial pressure on the High Needs Block. This is not currently accounted for within the forecast that is presented in Appendix 2.

Provision for the SEND teaching support services continues to incorporate the changes in structures that were agreed by the Executive in 2018. The planned budget, and four-year forecast, provide for pay / inflationary

increases on current capacity, but also include aspects of the £0.920m inclusion investment plan. The capacity of support services is likely to need to be reviewed in future years, where the numbers of EHCPs in mainstream settings continues to grow, but also in the light of the outcomes of the DfE's SEND Green Paper.

Provision for Speech and Language Therapy support in resourced provisions is continued on the re-commissioned basis, as discussed with the Schools Forum in July 2021.

As well as introducing new funding models for delegated provision – the Banded Model, the Day Rate Model and the amended SEND Floor Model – we adjusted at April 2020 our approach to supporting schools, academies and other providers for the costs of specialist equipment. This approach continues.

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 have proposed to return this contribution to the Early Years Block in 2023/24 and the four-year forecast assumes this.

### **High Needs Block – Risks, Monitoring and Mitigating Action**

15. **Bradford's DSG account is not forecasted to be cumulatively in deficit at either 31 March 2023 or 31 March 2024. Our forecast does currently identify however, that there is clear risk of a cumulative deficit building within our High Needs Block by the end of the 2025/26 financial year, as a result of recurrent structural in-year over spending. The risk of cumulative deficit by the end of the 2026/27 financial year is then high.** This position is different from what we presented this time last year. Our January 2022 forecast did previously indicate the potential for in-year overspending, but to a much lower extent over the medium term.
16. **Whilst the value of surplus balance we hold within the High Needs Block provides some buffer, and some time, we now must begin to more closely consider mitigating actions, beginning from the 2024/25 financial year. We recognise that our forecast is constructed on a series of estimates and that the future position may change – to improve or worsen. Therefore, whilst seeking to identify more permanent structural spending strategies for the benefit of our High Needs Block for the longer term e.g. inclusion and early support and intervention, we must identify mitigating actions, in priority order, which would be introduced should the forecast not substantially improve. This will be a piece of work for the Authority to discuss with the Schools Forum during 2023.**
17. Factors that may improve our forecast over the next four years are:
  - a. A substantial improvement in High Needs Block funding from April 2024. We currently estimate a 4.5% per capita increase. 1% is worth about £1.5m to us. Looking at the settlement that was announced within the 17 November Autumn Statement, and the additional £400m that has been allocated subsequently in 2023/24, it is difficult however, to see how the High Needs Block settlement will substantially improve above current forecasted levels, and certainly to the extent that this would remove on its own the over-spending that we forecast. There doesn't appear to be the flexibility within the current national schools' budget in 2024/25 to afford a large enough injection of additional money.
  - b. A substantial slowing down of growth rates in the numbers of children and young people with EHCPs and in requests for new assessments. As we indicated earlier in this report, our overall proportion of children and young people with EHCPs remains lower than the national average. This is suggestive therefore, that there is still



more growth in our EHCPs to come, and with the potential for our future annual growth rate to be higher than in other authorities. However, there are factors that may change this outlook, including the reduction in school population as a result of wider demographic changes (which may result in fewer children and young people being assessed for EHCPs in the future), the flattening out of pupil numbers growth in the secondary and post 16-phases (which again may result in fewer new EHCPs), and the impact of the DfE's SEND Review, which clearly is aimed at promoting early intervention (and the de-escalation of needs) and providing clearer (and tighter) guidance on the circumstances in which EHCPs are appropriate. The DfE's expectation certainly is that the growth in EHCPs will slow down.

- c. The impact of new SEND places (and a possible new Special School Free School) on the de-escalation of cost of placements in independent and non-maintained provisions. Within this, the DfE's SEND Review may also have positive impact. The Review indicates that work may take place to seek to bring independent schools into the national place-plus framework, so that cost of placements is governed by a national banding model, to be developed. This would help to control the annual escalation of charges for individual high cost placements.

However, competing with this potential positive impact, we have not built into our forecast the estimated £4.68m revenue cost of a new Free School. We have also not included the cost of any other new SEND specialist places, after the places that are to be created during the 2023/24 financial year. The continued development of places will be governed, first and foremost, by the Authority's places sufficiency forecasting. Certainly, where we are successful in our Free School bid, we will need to assess the overall continuing affordability of all our specialist places, including those that we have created in recent years, in part, as a result of not being previously successful in achieving a Free School. Our forecast indicates that we are unlikely to be able to afford to continue to increase the number of specialist places we fund, without adjusting spending within the High Needs Block. Any adjustments would need to be actioned incrementally and therefore, would not have immediate single-year impact. We certainly would be looking to achieve a cost per place efficiency, by reducing the number of placements in independent provisions in favour of placements in 'local' settings. However, again, we are aware that this would be a saving that would likely only be achieved incrementally over time. It would also depend, quite obviously, on whether we are successful in our Free School bid.

- d. The impact of the DfE's SEND Green Paper (the national SEND and Alternative Provision Review), which has clear strands that are intended to reduce cost pressure on local authority High Needs Blocks. Some of these strands, whilst producing savings for the High Needs Block, may have significant implications for the funding of individual schools and providers. In recent messaging however, the DfE has emphasised that the Green Paper represents a 'longer term' programme of change. Therefore, the extent to which changes may impact on our current four-year forecast is unclear, but possibly limited. We expect that the DfE's publication of an 'improvement plan' in the new year will give us a more confirmed timeline.

It is also the case however, that there are aspects of the SEND Green Paper proposals that may increase our High Needs Block spending base, to the extent that the net impact of the Review may be increased costs in the short-term, before savings are realised in the longer-term. This possibly is true for additional activity and emphasis on the allocation of funding towards early intervention. This is also possibly true for the proposed changes in the funding of Alternative Provision, with the movement towards fixed budgets and the greater emphasis on the allocation of funding for prevention, and outreach support, to reduce the escalation of needs.

#### **Attachments**

- 2023/24 planned budget high needs places breakdown (Appendix 1).
- Four-year High Needs Block forecast (Appendix 2).



## Annex - Key HNB Statistics and HNB Benchmarking Data

### 1. EHCPs as a % of Bradford's school population & recent growth rates

The table below shows the number of EHCPs recorded in Bradford's schools and academies as a % of Bradford's total school population. The totals include state funded nursery, primary, secondary and special schools, non-maintained special schools, PRUs and independent schools.

|                          | January 2019 | January 2020 | January 2021 | January 2022 |
|--------------------------|--------------|--------------|--------------|--------------|
| Bradford                 | 2.8%         | 3.0%         | 3.4%         | 3.6%         |
| National                 | 3.1%         | 3.3%         | 3.7%         | 4.0%         |
| Yorkshire and the Humber | 2.8%         | 3.0%         | 3.3%         | 3.5%         |

The table below shows the number of EHCPs recorded in Bradford's schools and academies over the same time period. The totals include state funded nursery, primary, secondary and special schools, non-maintained special schools, PRUs and independent schools.

|              | Bradford<br>Number | Bradford<br>% Growth | National<br>Number | National<br>% Growth | Y&H<br>Number | Y&H<br>% Growth |
|--------------|--------------------|----------------------|--------------------|----------------------|---------------|-----------------|
| January 2022 | 3,784              | 6.4%                 | 355,566            | 9.2%                 | 31,104        | 9.1%            |
| January 2021 | 3,558              | 14.7%                | 325,618            | 10.5%                | 28,501        | 10.0%           |
| January 2020 | 3,102              | 6.0%                 | 294,758            | 8.7%                 | 25,904        | 8.3%            |
| January 2019 | 2,927              | n/a                  | 271,165            | n/a                  | 23,919        | n/a             |

For slightly wider context, the table below shows the total number of EHCPs that Bradford Local Authority is responsible for, including those placed in other providers rather than in schools and academies e.g. Further Education Colleges, and in other local authorities, over the same time period.

|              | Bradford<br>Number | Bradford<br>% Growth | National<br>Number | National<br>% Growth | Y&H<br>Number | Y&H<br>% Growth |
|--------------|--------------------|----------------------|--------------------|----------------------|---------------|-----------------|
| January 2022 | 4,891              | 5.0%                 | 473,255            | 9.9%                 | 42,072        | 9.3%            |
| January 2021 | 4,659              | 15.7%                | 430,697            | 10.4%                | 38,506        | 9.5%            |
| January 2020 | 4,028              | 9.7%                 | 390,109            | 10.2%                | 35,164        | 10.6%           |
| January 2019 | 3,673              | n/a                  | 353,995            | n/a                  | 31,792        | n/a             |

The table below shows the % of pupils recorded with EHCPs in mainstream primary and secondary schools and academies in Bradford.

|              | Bradford<br>Primary | Bradford<br>Secondary | National<br>Primary | National<br>Secondary | Y&H<br>Primary | Y&H<br>Secondary |
|--------------|---------------------|-----------------------|---------------------|-----------------------|----------------|------------------|
| January 2022 | 2.1%                | 2.3%                  | 2.3%                | 2.2%                  | 1.9%           | 2.0%             |
| January 2021 | 1.9%                | 2.1%                  | 2.1%                | 2.0%                  | 1.8%           | 1.9%             |
| January 2020 | 1.6%                | 1.8%                  | 1.8%                | 1.8%                  | 1.5%           | 1.7%             |
| January 2019 | 1.5%                | 1.6%                  | 1.6%                | 1.7%                  | 1.4%           | 1.6%             |

2. Change in SEND Support as a % of Bradford’s school population

The table below shows the number of pupils in Bradford’s schools and academies recorded at SEND Support each January as a % of Bradford’s total school population. The totals include state funded nursery, primary, secondary and special schools, non-maintained special schools, PRUs and independent schools.

|                          | <b>January 2019</b> | <b>January 2020</b> | <b>January 2021</b> | <b>January 2022</b> |
|--------------------------|---------------------|---------------------|---------------------|---------------------|
| Bradford                 | 13.8%               | 13.2%               | 12.7%               | 13.0%               |
| National                 | 11.9%               | 12.1%               | 12.2%               | 12.6%               |
| Yorkshire and the Humber | 12.2%               | 12.4%               | 12.4%               | 12.9%               |

3. Most Prevalent Primary Need

Nationally, at January 2022, the most common type of primary need recorded for pupils with EHCPs continues to be Autism Spectrum Disorders and for pupils with SEND support to be Speech, Communication and Language Needs. SEND is more prevalent in boys than girls, with boys representing 72.8% of all pupils with EHCPs and 63.5% of pupils recorded at SEND Support.

In Bradford, at January 2022, the most common type of primary need for pupils with EHCPs also continues to be Autism Spectrum Disorders, which is the same as the national picture. However, the most common type of primary need for pupils with SEND Support continues to be Moderate Learning Difficulties, closely followed by Speech, Language and Communication Need. SEND is more prevalent in boys than girls, with boys representing 71.6% of all pupils with EHCPs and 64.0% of pupils recorded at SEND Support.

4. Special School / Special School Academy numbers as a % of Bradford’s total pupil population

At January 2022, 1.44% of Bradford’s school population was recorded in state funded special schools and special school academies. This compares with 1.43% recorded at January 2021. The national average was 1.59% at January 2022 and 1.52% at January 2021. The Yorkshire & Humber average was 1.39% at January 2022 and 1.32% at January 2021. If Bradford’s special school and special school academy population was at the national average of 1.59% at January 2022, we would have recorded a further 155 FTE pupils in our special schools and special school academies at January 2022 (with a total of 1,624 FTE pupils on roll). We are currently funding 1,540 places across maintained special schools and special school academies, with plans to develop more places. Our monitoring shows that we do not have spare capacity remaining in our special schools and special school academies and so the continued development of additional special school places is an important part of our High Needs Block spending strategy.

5. EHCP School Population Distribution at January 2022

The table below shows the number and % of EHCPs that were recorded at January 2022 in Bradford’s schools and academies, by type of provision. The totals include state funded nursery, primary, secondary and special schools, non-maintained special schools, PRUs and independent schools. \* please note that resourced provisions are included under the mainstream school heading (and EYESP places are included under the MNS heading). It is not possible separate resourced provision from these totals.

|                    | <b>Bradford</b> | <b>Bradford</b> | <b>National</b> | <b>National</b> | <b>Y&amp;H</b> | <b>Y&amp;H</b> |
|--------------------|-----------------|-----------------|-----------------|-----------------|----------------|----------------|
|                    | <b>Number</b>   | <b>%</b>        | <b>Number</b>   | <b>%</b>        | <b>Number</b>  | <b>%</b>       |
| <b>Total EHCPs</b> | <b>3,784</b>    | <b>3.6%</b>     | <b>355,566</b>  | <b>4.0%</b>     | <b>31,104</b>  | <b>3.5%</b>    |
| <i>Special</i>     | <i>1,469</i>    | <i>38.8%</i>    | <i>140,230</i>  | <i>39.4%</i>    | <i>11,976</i>  | <i>38.5%</i>   |

|                               |       |       |         |       |        |       |
|-------------------------------|-------|-------|---------|-------|--------|-------|
| <i>PRU</i>                    | 31    | 0.8%  | 3,295   | 0.9%  | 720    | 2.3%  |
| <i>MNS</i>                    | 49    | 1.3%  | 535     | 0.2%  | 70     | 0.2%  |
| <i>Independent &amp; NMSS</i> | 68    | 1.8%  | 28,912  | 8.1%  | 1,869  | 6.0%  |
| <i>Mainstream P&amp;S *</i>   | 2,167 | 57.3% | 182,594 | 51.4% | 16,469 | 53.0% |

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| Setting  | Type (AP or SEND) | 22/23 Initial Planned Budget AY Places (FTE) | 23/24 AY Current Planned Places (FTE) |
|--|-------------------|--|---------------------------------------|
| Bradford Alternative Provision Academy   | AP                | 65.0   | 65.0                                  |
| Park Aspire  | AP                | 90.0   | 90.0                                  |
| Other Alternative Provision  | AP                | 10.0   | 5.0                                   |
| Centrally Managed EinH, Tracks and Medical Home Tuition Service "notional" places      | AP                | 49.0   | 49.0                                  |
| Early Years Resourced Provision - Abbey Green Nursery School                           | SEND              | 6.0  | 6.0                                   |
| Early Years Resourced Provision - Canterbury Nursery School and Children's Centre      | SEND              | 16.8   | 16.8                                  |
| Early Years Resourced Provision - Hirst Wood Nursery School                            | SEND              | 0.0  | 6.0                                   |
| Early Years Resourced Provision - Midland Road Nursery School                          | SEND              | 6.0  | 6.0                                   |
| Early Years Resourced Provision - St Edmund's Nursery School and Children's Centre     | SEND              | 19.8   | 19.8                                  |
| Early Years Resourced Provision - Strong Close Nursery School                          | SEND              | 18.0   | 18.0                                  |
| Early Years Resourced Provision - Balance of places (flex inc. for 30 hours provision) | SEND              | 11.4   | 5.4                                   |
| Resourced Provision LA Led - Girdlington Primary School                                | SEND              | 20.0   | 20.0                                  |
| Resourced Provision LA Led - Swain House Primary School                                | SEND              | 20.0   | 20.0                                  |
| Resourced Provision LA Led - Grove House Primary School                                | SEND              | 12.0   | 12.0                                  |
| Resourced Provision LA Led - Hanson School   | SEND              | 48.0   | 48.0                                  |
| Special - Beechcliffe School   | SEND              | 248.0  | 248.0                                 |
| Special - Chellow Heights School   | SEND              | 250.8  | 250.8                                 |
| Special - Co-op Academy Delius   | SEND              | 171.0  | 171.0                                 |
| Special - Beckfoot Hazelbeck Academy   | SEND              | 144.0  | 144.0                                 |
| Special - High Park School   | SEND              | 130.0  | 130.0                                 |
| Special - Beckfoot Phoenix Primary Special School                                      | SEND              | 102.0  | 102.0                                 |
| Special - Co-op Academy Southfield   | SEND              | 360.0  | 360.0                                 |
| Special - Oastler School   | SEND              | 134.0  | 134.0                                 |
| Resourced Provision School Led - Carrwood Primary School                               | SEND              | 12.0   | 12.0                                  |
| Resourced Provision School Led - Denholme Primary School                               | SEND              | 8.0  | 8.0                                   |
| Resourced Provision School Led - Green Lane Primary School                             | SEND              | 24.0   | 24.0                                  |
| Resourced Provision School Led - High Craggs Primary Academy                           | SEND              | 6.0  | 6.0                                   |
| Resourced Provision School Led - Crossflatts Primary School                            | SEND              | 16.0   | 16.0                                  |
| Resourced Provision School Led - Beckfoot Academy                                      | SEND              | 6.0  | 6.0                                   |
| Resourced Provision School Led - Oasis Academy (Lister Park)                           | SEND              | 16.0   | 16.0                                  |
| Resourced Provision School Led - Co-op Academy Grange                                  | SEND              | 24.0   | 24.0                                  |
| Resourced Provision School Led - Parkside School                                       | SEND              | 14.0   | 14.0                                  |
| Resourced Provision School Led - The Holy Family Catholic School                       | SEND              | 20.0   | 20.0                                  |
| Resourced Provision School Led - Beckfoot Thornton Academy                             | SEND              | 16.0   | 16.0                                  |
| Resourced Provision School Led - Titus Salt School                                     | SEND              | 30.0   | 30.0                                  |
| Resourced Provision School Led - Bradford Academy                                      | SEND              | 27.0   | 27.0                                  |
| Resourced Provision School Led - Bradford Forster Academy                              | SEND              | 10.0   | 2.0                                   |
| Resourced Provision School Led - Haworth Primary Academy                               | SEND              | 12.0   | 12.0                                  |
| Resourced Provision School Led - Crossley Hall Primary School                          | SEND              | 24.0   | 24.0                                  |
| Resourced Provision School Led - Long Lee Primary School                               | SEND              | 16.0   | 16.0                                  |
| Resourced Provision School Led - Worth Valley Primary Academy                          | SEND              | 8.0  | 8.0                                   |
| Resourced Provision School Led - Parkwood Primary Academy                              | SEND              | 12.0   | 12.0                                  |
| Resourced Provision School Led - Cottingley Village Primary School                     | SEND              | 16.0   | 16.0                                  |
| Resourced Provision School Led - Horton Park Primary Academy                           | SEND              | 12.0   | 12.0                                  |
| Resourced Provision School Led - Ilkley Grammar School                                 | SEND              | 20.0   | 24.0                                  |
| Resourced Provision School Led - Holybrook Primary School                              | SEND              | 16.0   | 16.0                                  |
| Resourced Provisions LA Led - Primary Phase  | SEND              | 86.0   | 104.0                                 |
| Resourced Provisions LA Led - Secondary Phase  | SEND              | 50.0   | 68.0                                  |
| Further Education - Bradford College   | SEND              | 220.0  | 288.0                                 |
| Further Education - Shipley College  | SEND              | 148.0  | 164.0                                 |
| Further Education - Aspire I   | SEND              | 36.0   | 36.0                                  |
| SEND - Additional Places Under Development (still to go through Statutory Process)     | SEND              | 120.0  | 180.0                                 |
| <b>Grand Totals</b>  |                   | <b>2,956.8</b>                               | <b>3,127.8</b>                        |
| <b>Sub Totals SEND</b>   |                   | <b>2,742.8</b>                               | <b>2,918.8</b>                        |
| <i>Early Years Resourced Provision</i>   |                   | <i>78.0</i>                                  | <i>78.0</i>                           |
| <i>Local Authority Led Resourced Provisions - Sensory</i>                              |                   | <i>100.0</i>                                 | <i>100.0</i>                          |
| <i>Maintained Special Schools and Special Academies</i>                                |                   | <i>1,539.8</i>                               | <i>1,539.8</i>                        |
| <i>School Led Resourced Provisions</i>   |                   | <i>365.0</i>                                 | <i>361.0</i>                          |
| <i>Local Authority Led Resourced Provisions</i>  |                   | <i>136.0</i>                                 | <i>172.0</i>                          |
| <i>Further Education (Post 16)</i>   |                   | <i>404.0</i>                                 | <i>488.0</i>                          |
| <i>Additional SEND Places not yet allocated</i>  |                   | <i>120.0</i>                                 | <i>180.0</i>                          |
| <b>Sub Totals Alternative Provision</b>  |                   | <b>214.0</b>                                 | <b>209.0</b>                          |
| <i>PRUs &amp; Alternative Providers</i>  |                   | <i>165.0</i>                                 | <i>160.0</i>                          |
| <i>Education in Hospital, Tracks (notional places)</i>                                 |                   | <i>49.0</i>                                  | <i>49.0</i>                           |

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**High Needs Block ESTIMATED Trajectory 2023-2027**

Document PP Appendix 2

This is an estimated trajectory where the current cost base moves forward over the next 4 years, adjusted for what can be reasonably estimated about National Funding Formula, needs-demand growth and SEND placement development. This does not yet take into account specifically any implications of the national SEND / Alternative Provision reviews. This also does not include the revenue budget cost of a new Special School Free School.

| 2023/24<br>HNB<br>Forecast | 2024/25<br>HNB<br>Forecast | 2025/26<br>HNB<br>Forecast | 2026/27<br>HNB<br>Forecast |
|----------------------------|----------------------------|----------------------------|----------------------------|
| 25,829,679                 | 21,629,755                 | 11,096,693                 | -4,916,291                 |

**Balance Brought Forward from the previous year**

**Income**

|   |                    |                    |                    |                    |
|---|--------------------|--------------------|--------------------|--------------------|
| DfE HNB Allocation (estimated 4.5% Eapp growth continuing from April 2024 on a forecasted reducing school population) | 116,884,377        | 121,386,364        | 125,644,384        | 129,375,963        |
| <b>Total Income</b>   | <b>116,884,377</b> | <b>121,386,364</b> | <b>125,644,384</b> | <b>129,375,963</b> |

**Expenditure**

|  |                    |                    |                    |                    |
|--|--------------------|--------------------|--------------------|--------------------|
| Place Plus - Maintained Special Schools and Special School Academies (current base; 1.5% annual creep)   | 38,182,369         | 38,755,104         | 39,336,431         | 39,926,477         |
| Place Plus - Early Years Enhanced Provisions (current base; 1.5% annual creep)   | 1,650,000          | 1,674,750          | 1,699,872          | 1,725,370          |
| Place Plus - School-Led Resourced Provisions Primary & Secondary (current base; 1.5% annual creep)   | 6,096,565          | 6,221,847          | 6,315,174          | 6,409,902          |
| Place Plus - LA-Led Resourced Provisions Sensory (current base; 1.5% annual creep)   | 2,752,459          | 2,793,746          | 2,835,652          | 2,878,187          |
| Place Plus - Other LA Resourced Provisions (current base; 1.5% annual creep)   | 3,521,674          | 3,574,499          | 3,628,117          | 3,682,539          |
| Place Plus - PRUs, Alternative Provision Academies & Other Alternative Providers (current base; 1.5% annual creep)                               | 4,066,704          | 4,127,705          | 4,189,620          | 4,252,465          |
| Place Plus - EHCPs Post 16 in Further Education institutions & SPIs (heavily estimated growth from population bulge)                             | 9,008,000          | 10,428,194         | 11,707,554         | 12,707,554         |
| Place Plus - New SEND Places not yet allocated (no more places beyond 23-24 AY; Special School Free School not built in)                         | 3,408,667          | 4,410,670          | 4,454,777          | 4,499,324          |
| Grant to Special Schools / Academies & PRUs / AP re. the 3.4% Per Place Funding Condition (1.5% annual creep)                                    | 1,392,986          | 1,413,881          | 1,435,089          | 1,456,615          |
| Teacher Pay & Pensions Grants - special schools, resourced provisions and AP providers (current base; 1.5% annual creep)                         | 1,539,732          | 1,562,828          | 1,586,270          | 1,610,064          |
| Mainstream EHCPs (Pre 16) including SEND Funding Floor, Personal Budgets and PVI EHCPs (current base plus EHCP growth at £3.5m per year)         | 18,604,000         | 22,104,000         | 25,604,000         | 29,104,000         |
| Mainstream EHCPs (Post 16 element 2 cost) (continue of current base plus population bulge)   | 150,000            | 210,000            | 270,000            | 330,000            |
| Independent & OLA Placements & Education OLAs (heavily estimated; assumes continued current base + £3.5m per year)                               | 21,750,000         | 25,250,000         | 28,750,000         | 32,250,000         |
| Medical Home Tuition, Education in Hospital & Tracks Central Service (continuation of current base; annual 5% uplift)                            | 1,583,000          | 1,662,150          | 1,745,258          | 1,832,520          |
| Speech & Language Therapy Services (current base; annual 5% uplift)  | 328,000            | 344,400            | 361,620            | 379,701            |
| Specialist Equipment (current base; annual 4% uplift)  | 100,000            | 100,000            | 100,000            | 100,000            |
| Copyright Licences (5% annual inflation; price set by DfE)   | 78,145             | 82,052             | 86,155             | 90,463             |
| BSF (PFI) - Special Schools (annual RPIX increase estimated 5%)  | 917,000            | 962,850            | 1,010,993          | 1,061,542          |
| Teaching & SEND Support Services (current base continues; includes continuation of Inclusion Investment Plan (to be reviewed); annual 5% uplift) | 5,715,000          | 6,000,750          | 6,300,788          | 6,615,827          |
| Special Schools Inclusion Outreach (continuation of Inclusion Investment Plan - to be reviewed)  | 240,000            | 240,000            | 240,000            | 240,000            |
| <b>Total Expenditure</b>   | <b>121,084,301</b> | <b>131,919,426</b> | <b>141,657,368</b> | <b>151,152,550</b> |

| <b>In Year Budget Position</b>  | <b>-4,199,924</b> | <b>-10,533,062</b> | <b>-16,012,984</b> | <b>-21,776,587</b> |
|---|-------------------|--------------------|--------------------|--------------------|
| Brought Forward HNB Balance from the Previous Year Financial Year                         | 25,829,679        | 21,629,755         | 11,096,693         | -4,916,291         |
| <b>Forecasted HNB Carry Forward Balance at the end of the financial year (Cumulative)</b> | <b>21,629,755</b> | <b>11,096,693</b>  | <b>-4,916,291</b>  | <b>-26,692,878</b> |

|  |          |                    |                    |                    |
|--|----------|--------------------|--------------------|--------------------|
| Pressure / saving brought from previous year's over / under spending |          | -4,199,924         | -10,533,062        | -16,012,984        |
| Change in Income vs. Previous Year                                   |          | 4,501,987          | 4,258,020          | 3,731,579          |
| Change in Expenditure vs. the Previous Year                          |          | -10,835,125        | -9,737,942         | -9,495,182         |
| <b>Total In year position</b>  | <b>0</b> | <b>-10,533,062</b> | <b>-16,012,984</b> | <b>-21,776,587</b> |

|  |       |        |        |        |
|--|-------|--------|--------|--------|
| % of HNB Income that is spent on pupil places provision      | 95.9% | 100.9% | 104.9% | 108.9% |
| % of HNB Expenditure that is spent on pupil places provision | 92.6% | 92.9%  | 93.1%  | 93.2%  |

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## 2023/24 Financial Year Dedicated Schools Grant Decisions and Recommendations List

This report lists the decisions and recommendations that the Schools Forum is asked to make in supporting the Local Authority to establish the Dedicated Schools Grant (DSG) planned budget and formula funding arrangements for the 2023/24 financial year. The Forum is asked to take decisions (as required by the Regulations), and to make its final formal recommendations, on the Authority's proposals.

### 1. Schools Block Centrally Managed Funds 2023/24 (DECISION)

#### Schools Block De-Delegated Funds 2023/24 (DECISION)

Please refer to Document PN Appendices 1 – 3.

1.1 Schools Members representing maintained primary & secondary schools only are asked to **decide the values of de-delegated funds, and the contributions to be taken from the 2023/24 formula funding allocations of maintained primary & secondary schools**, as proposed in Document PN and its appendices (VOTE BY PHASE).

- a) **School Re-Organisation Costs (Safeguarded Salaries) (Primary & Secondary)**: continue de-delegation from both the primary and secondary phases for the actual cost of continuing safeguarded salaries in maintained primary and secondary schools.
- b) **School Re-Organisation Costs (Sponsored academy conversions budget deficits) (Primary phase only)**: Continue to 'pause' de-delegation from the primary phase, meaning that no new contribution is taken in 2023/24. Review again for 2024/25. The Schools Forum will be provided with monitoring reports where this fund's brought forward balance is used in 2023/24 for this purpose.
- c) **Exceptional Costs & Schools in Financial Difficulty (Primary phase only)**: continue de-delegation from the primary phase at the 2022/23 per pupil value.
- d) **Costs of FSM Eligibility Assessments (Primary & Secondary)**: continue de-delegation from both the primary and secondary phases at the 2022/23 per FSM6 values, with contributions continuing to be taken using Free School Meals (FSM) Ever 6 data.
- e) **Fisher Family Trust (Primary phase only)**: continue de-delegation from the primary phase, recovering the cash value to match the actual final cost, which is still to be confirmed. Please note that the Schools Members representing maintained primary schools decided on 12 October 2022 to continue de-delegation in 2023/24 for the purposes of subscribing to FFT. As such, this decision is repeated here only for reference and for completeness.
- f) **Trade Union Facilities Time – Negotiator Time (Primary & Secondary)**: continue de-delegation from primary and secondary phases at the 2022/23 per pupil value.
- g) **Trade Union Facilities Time – Health and Safety Time (Primary & Secondary)**: continue de-delegation from primary and secondary phases at the 2022/23 per pupil value.
- h) **School Maternity / Paternity 'insurance' fund (Primary phase only)**: continue de-delegation from the primary phase at a value forecasted to afford the scheme for a full year. The £app cost is shown in Document PN Appendix 2 (£26.44 per pupil, which is + 30% on 2022/23). The £26.44 per pupil value includes the release, on a one off basis, of £0.10m of balance brought forward within this fund. It is estimated that the scheme will cost £0.75m in total in 2023/24.
- i) **School Staff Public Duties and Suspensions Fund (Primary phase only)**: continue de-delegation from the primary phase on the same £app basis as 2022/23.

- j) **School Improvement (Replacement of the School Improvement Monitoring and Brokering Grant) (Primary & Secondary)**: continue de-delegation from primary and secondary phases at the 2022/23 per pupil value. Based on estimate of the cost of the Authority's school improvement programme, and of the total income that will be available (incorporating the mid-year conversion of maintained schools to academy), £0.122m of balance brought forward will be used within this fund in 2023/24, alongside new year contributions.

1.2 Schools Members representing maintained primary & secondary schools only are asked to agree (to decide) **the principles** behind the management of the Schools Block de-delegated funds listed in paragraph 1.1:

- a) Any over or under spend within these funds will be written off from, or added back to, the DSG's de-delegated funds in 2024/25 on a phase specific, fund specific, basis i.e. if primary schools overspend in the maternity / paternity insurance scheme fund the value of the fund created through de-delegation in 2024/25, support by available surplus balances brought forward, will need to compensate for this.
- b) These decisions set the position for the 2023/24 financial year only.
- c) The funds will be managed and allocated according to their applicable criteria as set out in the autumn 2022 consultation document (where it was proposed to continue the same criteria as used in 2022/23).

1.3 The Schools Forum is asked to note that a total net surplus balance of de-delegated funds of £0.797m is forecasted to be carried forward within the Schools Block into 2023/24. As such, the Schools Forum is not asked to write off from the 2023/24 Schools Budget any deficit associated with de-delegated funds. Within the 2023/24 proposals, £0.100m of the £0.797m is specifically earmarked to support the cost of the school maternity / paternity insurance fund and £0.122m is earmarked to support the cost of the school improvement fund. On this basis, it is estimated that the balance of de-delegated funds held within the Schools Block at the end of the 2023/24 financial will reduce to £0.575m.

### **Schools Block Growth Fund 2023/24 (DECISION)**

Please refer to Document PN Appendix 1 (full list of DSG centrally managed funds) and Document PQ Appendix 1 (list of proposed allocations from the Growth Fund to existing expanding schools and academies for the Forum's approval).

1.4 The Schools Forum is asked to agree (to decide) the allocations from the 2023/24 Schools Block Growth Fund to **existing expansions and existing bulge classes** as proposed and as listed in Document PQ Appendix 1. Members are asked to note:

- a) There are 15 allocations with a total gross value of £0.571m. 6 Primary schools / Primary academies; 2 all through academies; 7 Secondary academies.
- b) The allocations to the all through academies and to the secondary academies simply complete, for the full 2022/23 academic year, the growth fund allocations that are set out in Document PJ (presented under agenda item 5), which cover the period up to 31 March 2023. Appendix 1 does not include allocations from the Growth Fund to the secondary phase for the 2023/24 academic year. Allocations for both continuing and new expansions and bulge classes in the secondary phase for the 2023/24 academic year will be funded from the provision explained in paragraph 1.5 below and will be presented to the Schools Forum for agreement in December 2023, following the collection of the October 2023 Census.
- c) The £0.374m for academies for the period April to August 2023 will be reimbursed back to the Schools Block via the ESFA's academy recoupment process. As such, the £0.374m does not represent a cost to our 2023/24 Schools Block. So, although the Forum is asked to approve allocations totalling £0.571m, as listed in Document PQ Appendix 1, the actual net cost of these allocations to the 2023/24 Schools Block is £0.571m minus £0.374m = £0.197m.

1.5 The Schools Forum is asked to agree (to decide) that a further planned budget of £0.600m is taken from the 2023/24 Schools Block for the Growth Fund to cover **new allocations to be agreed during 2023/24**. This planned budget is only for growth in the secondary-phase i.e. no new budget provision is proposed to be

taken from the 2023/24 Schools Block for primary-phase growth. All new in-year allocations from the Growth Fund will be agreed by the Schools Forum, prior to confirmation these with the receiving school or academy. Growth Fund allocations will continue as a standing Schools Forum agenda item to enable this.

- a) Recognising: that the pupil population in the primary-phase is reducing, as a consequence of demographic trends, and that a value of £1.320m of balance held within the Schools Block is forecasted to be carried forward into 2023/24, the Authority proposes not to take new budget from the 2023/24 Schools Block allocation for the purposes of funding growth in the primary-phase. A proportion of the £1.320m balance instead will be available to be used to meet any costs of new growth that may be agreed for the primary-phase in 2023/24.
- b) £0.600m will fund 8 additional forms of entry or bulge classes in the secondary phase at September 2023 (for the period September 2023 to 31 March 2024). By comparison, the Authority has funded 9 forms of entry, in total, for the period September 2022 to March 2023. As above with the primary-phase, recognising that a value of £1.320m of balance held within the Schools Block is forecasted to be carried forward into 2023/24, the Authority proposes to take a reduced budget from the 2023/24 Schools Block allocation, for the purposes of funding growth in the secondary-phase, with a proportion of the £1.320m balance being available to meet any additional cost above 8 forms of entry. In doing this, the Authority seeks to use the existing balance to maximise the value of 2023/24 Schools Block funding that is available to be allocated to other purposes, including in support of continuing to afford our full mirroring of the National Funding Formula for mainstream primary and secondary schools and academies.
- c) The Authority does however, also recognise that new flexibilities (for the management of growth, falling rolls and 'surplus places') are expected to be brought into Schools Block arrangements in 2024/25, following the most recent National Funding Formula (NFF) consultation. This consultation quite clearly put forward the view that local authorities should retain Growth Fund responsibilities under the NFF. Retaining a surplus balance into 2024/25 will help therefore, given that there are uncertainties currently about how growth will be funded (with the concern that we expressed in our consultation response; that the proposed 'netting off' of pupil numbers 'growth' from 'reduction' may result in insufficient funding being available to support either issue). Falling rolls is also a significant issue for the primary phase, in particular, and we take the view that we would wish to see how the expected new flexibilities could be used, before committing the Growth Fund balance (as well as the Falling Rolls Fund Balance – see below) elsewhere to more general formula spending. However, also in the context of our overall Schools Block spending position in 2023/24, following a £1m cost of 'data lag' (this is explained further in section 7), we may wish to consider using the Growth Fund (and Falling Rolls Fund) reserve balances in future years to support the overall cost of our mainstream formula, prior to the full implementation of the NFF.

1.6 The Schools Forum is asked to agree (to decide) to use the **criteria** for the allocation of the Schools Block Growth Fund in 2023/24 as set out in the autumn 2022 consultation document, which are the criteria used in 2022/23.

### **Schools Block Falling Rolls Fund 2023/24 (DECISION)**

Please refer to Document PN Appendix 1 (full list of DSG centrally managed funds).

1.7 The Schools Forum is asked to agree (to decide) to **continue the Falling Rolls Fund for the primary phase for the 2023/24 financial year**. Whilst we have concluded that the Falling Rolls Fund currently holds limited value, as it is not a mechanism that will support the vast majority of primary-phase schools and academies, it is a mechanism that was developed following close review. As such, the Authority does not wish to remove this mechanism entirely from our Schools Block funding approach.

1.8 The Schools Forum is asked to agree (to decide) to use the **criteria** for the allocation of the Schools Block Falling Roll Fund in 2023/24 as set out in the autumn 2022 consultation document, which are the criteria used in 2022/23 (with the annual reference points moved on one year in time).

1.9 The Schools Forum is asked to agree (to decide) that the **cost of the 2023/24 Falling Rolls Fund be met from the balance that will be brought forward from 2022/23**, rather than by taking new budget from the 2023/24 Schools Block. Forum Members are asked to note that actual proposed allocations from the Falling Rolls Fund for this current financial year will be presented to the Schools Forum in March 2023. The

final value of balance that will be carried into 2023/24 therefore, will be confirmed at this point. On current modelling however, the Authority anticipates that there will not be any allocations from this fund for the 2022/23 financial year. Therefore, the balance carried forward is expected to be £0.500m.

1.10 The Schools Forum is asked to agree to the Authority's proposal to continue **to retain this balance in 2023/24**, to be available to support costs in 2023/24, but also to be available to support schools and academies via the new flexibilities (for the management of falling rolls) that are expected to be brought into Schools Block arrangements in 2024/25. Falling rolls is a significant issue for the primary phase, in particular, and we take the view that we would wish to see how the expected new flexibilities could be used, before committing this balance (as well as the Growth Fund balance – see above) elsewhere to more general formula spending.

## 2. Early Years Block Centrally Retained Funds 2023/24 (DECISION)

Please refer to Document PN Appendix 1 (full list of DSG centrally managed funds).

2.1 The Schools Forum is asked to support the Authority to establish the 2023/24 DSG planned budget by **deciding the retention of funds for central management within the Early Years Block** as proposed and as listed in Document PN Appendix 1:

- a) £0.037m (continuation) for the Early Years Block's contribution to the **DfE Copyright Licences charge**.
- b) £0.119m (continuation) for access by maintained nursery schools to Schools Block **de-delegated funds** (Trade Union Facilities Time, Maternity / Paternity Insurance Scheme, Staff Public Duties and Suspensions). A breakdown of the £0.119m is given in Document PN Appendix 2. This budget counts within the maximum 5% of 3&4-year-old entitlement funding that the Authority is permitted to centrally retain within the Early Years Block.
- c) £0.650m (continuation) for the estimated cost of allocations to early years providers from the **Early Years SEND Inclusion Fund (EYIF)**. This budget is increased on the £0.500m that was held in 2022/23, in response to a growth in the number of claims (and in anticipation of an on-going higher claim level) The £0.650m budget is split £0.100m for 2-year-olds and £0.550m for 3&4-year-olds. The criteria proposed to be used to allocate the SEND Inclusion Fund are set out in our consultation on Early Years Single Funding Formula arrangements for 2023/24. Please see Document PK. These criteria are the same as currently used in 2022/23. The consultation is currently live and closes on 6 February. The outcomes of the consultation will be presented to the Schools Forum on 8 March. At this time, we are establishing the planned budget for the Early Years Block on the basis that the Authority's proposals will be agreed and implemented. \*

Although the £0.650m budget is shown here as centrally retained, the full value is intended for allocation to providers during the year. As such, the £0.550m proportion of this budget, to be allocated to eligible 3&4-year-olds, does not count towards the maximum 5% of 3&4-year-old entitlement funding that can be retained centrally within the Early Years Block. Although this will also be passed out to providers, because it is not allocated in respect of 3&4-year-olds, the £0.100m EYIF budget for 2-year-olds does count towards the 5%.

The School Forum is asked to note that the **Early Years Pupil Premium (£0.437m)** and **Disability Access Fund (£0.120m)** budgets, shown in Document PN Appendix 1, are funds that are also allocated to providers during the year, following the conditions set by the DfE, and these funds also do not count towards the maximum 5% central retention restriction. \*

\* To explain in a little more technical detail our overall approach to the financing of EYIF and DAF funding in 2023/24. 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, therefore, we propose to increase the DAF allocation per child, to £1,200, but also then to use the 2023/24 new year 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 £0.120m. 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.

- d) £0.216m (continuation) for **the Area SENCOs function** that is managed by the Local Authority in respect of Private, Voluntary and Independent (PVI) early years providers. This budget, over the COVID-19 pandemic period, was temporarily charged to the High Needs Block, but was returned to the Early Years Block at April 2022. The proposed budget for 2023/24 includes an allowance for pay award / inflation.
- e) £0.366m (returned to the Early Years Block) for the Early Years Block's contribution **to early years SEND support services, including portage**. Prior to April 2021, the contribution to early years SEND support services, was charged to the Early Years Block. In seeking to protect the Early Years Block, during the COVID-19 pandemic, we transferred this cost to be met by the High Needs Block, with the intention to transfer the cost back at an appropriate time. 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. The proposed budget for 2023/24 includes an allowance for pay award / inflation.
- f) £0.530m (continuation and increase), as presented to the Schools Forum on 7 December (Document PI), for 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 advice, support, 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 substantially 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. As we presented to the Forum on 7 December, in the context of financial benchmarking, and 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. An increased contribution will bring us more in line with the position in other local authorities.

2.2 The Schools Forum is asked to note that a total of £1.368m of the centrally retained budgets listed in paragraph 2.1 count towards the 5% of 3&4-year-old entitlement funding central retention restriction. As shown in the Early Years Pro-Forma (Document PO Appendix 5), we calculate on this basis that **96.7% of our estimated 2023/24 3&4-year-old entitlement funding (excluding the allocation of brought forward balances) will be passed-through to providers**; or, to put it another way, 3.3% of our estimated 2023/24 3&4-year-old entitlement funding will be either be centrally retained or will be used otherwise than for funding the 3&4-year-old entitlement and the 3&4-year-old Early Years SEND Inclusion Fund. The equivalent figure for 2022/23 was 97.2%.

The 96.7% is affected, not just by the values of budgets held centrally within the Early Years Block (the £1.368m), but also by the additional cost of the 2-year-old entitlement. We estimate at this time that the cost of funding the 2-year-old entitlement in 2023/24 may exceed its funding by £0.543m, due to the profile of hours to be funded across the year by term, including our 2<sup>nd</sup> headcount arrangement, and how this relates to the way the DfE funds the Early Years Block using the January Censuses. This is a position that we estimate is present when 2-year-old numbers reduce in line with demographic trends. This is also a position that we estimate may affect our 3&4-year-old numbers going forward. We will need to continue to monitor this situation closely, to ensure that our 2-year-old funding approach does not place excessive pressure on our 3&4-year-old entitlement funding on an on-going basis.

Previously, when we have included within our pass-through % calculation the benefit that has come into our Early Years Block spending position, as a result of the difference in profile of Early Years Block-level funded 3&4-year-old entitlement hours (on January censuses) and setting-level funded hours (on termly censuses), our formal pass-through % has been higher than 100%. In 2020/21, our pass-through % was 100.7%. This is because, historically, we have been funded at Early Years Block-level for a greater number of entitlement hours than providers have delivered, as counted on a 3 terms basis. One of the actions we took to protect the Early Years Block in 2021/22, and in 2022/23, was to remove this benefit. This is because we were unclear whether this benefit would exist, due to COVID-19 impact, and because we also predict that the reduction in numbers in early years, from demographic trends, will remove this benefit over time. Because of the way the DfE temporarily changed the Early Years Block methodology, this benefit was not present in 2021/22 and so we were correct to make this assumption. In the light of forecasted demographic trends, for the 2022/23 planned budget we set in January 2022, we continued to assume that this benefit would not be present. As we reported to the Forum on 7 December, 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. Cautiously, we have assumed some continuing benefit in the 2023/24 Early Years Block planned budget that is presented to this meeting.

2.3 Finally, the Schools Forum is asked to note that it is not expected that the balance of Early Years Block centrally managed funds held at the end of the 2022/23 financial year will be a deficit. As such, the Schools Forum is not asked to write off from the 2023/24 Schools Budget any deficit associated with an Early Years Block fund.

### **3. The Central Schools Services Block 2023/24 (DECISION)**

Please refer to Document PN Appendix 1 (full list of DSG centrally managed funds).

3.1 The Schools Forum is asked to agree (to decide) the allocation of the **Central Schools Services Block (CSSB)** for 2023/24 as proposed and as listed in Document PN Appendix 1:

- a) **Schools Forum Running Costs:** proposed to continue at £11,700, which is the 2022/23 value of £11,000 plus an allowance for pay award and inflation. This budget contributes to the costs of running the Schools Forum that are met by School Funding Team and by Committee Secretariat.
- b) **Pupil Admissions:** proposed to continue this budget at £0.987m, which is the 2022/23 value of £0.931m plus an allowance for pay award and inflation. Forum Members will recall that the Pupil Admissions budget was substantially increased in 2022/23 in response to service pressures.
- c) **DfE Copyright Licences:** a value of £0.406m. The cost of copyright licences for primary and secondary schools and academies is met from the CSSB. This is not a matter for decision for the Schools Forum, as the DfE negotiates the price and top-slices our DSG. The costs for early years and high needs providers are charged within our DSG model to the respective blocks. The DfE confirmed the 2023/24 costs on 21 December 2022; increased in total by 10.6% on 2022/23.
- d) **Education Services Grant (ESG) Statutory Duties:** proposed to continue this budget at £1.559m, which will continue to passport to the Local Authority's budget the 2022/23 committed cash budget. This is the former ESG Centrally Retained Duties Grant that was transferred into the DSG at April 2017 and is now allocated in support of the statutory duties that are delivered by the Local Authority on behalf of all state funded schools and academies. A list of statutory activities was presented to the Forum on 7 December 2022 in Document PI Appendix 3.
- e) **Education Access Officers:** proposed to be continued and uplifted in 2023/24 to £0.500m (from £0.472m held in 2022/23) for pay award / inflation.
- f) **Education Services Planning:** proposed to continue at £0.148m, which is the 2022/23 value of £0.140m plus an allowance for pay award and inflation. Forum Members will recall that this CSSB budget was newly established in 2022/23.

3.2 The Schools Forum is asked to note that, as a result of these proposals, there is no transfer of CSSB funding to any other DSG block. The full value of the 2023/24 CSSB funding settlement is allocated to



spending within the CSSB. The Schools Forum is also asked to note that CSSB spending for 2023/24, as proposed, is funded without any reliance on any other DSG block. However, the total cost of the funds listed in 3.1 above is £3.612m, which exceeds the 2023/24 CSSB allocation by £0.054m. The £0.054m is proposed to be met from the surplus balance that is forecasted to be carried forward into 2023/24. Please see section 5.

#### 4. The High Needs Block 2023/24 (RECOMMENDATION)

Please refer to:

- Document PL (the 2023/24 DSG summary, which summarises the planned High Needs Block budget).
- Document PP (the DSG Management Plan, which includes an updated view of the estimated High Needs Block future year trajectory and a list of planned commissioned specialist places).
- Document PO Appendix 3 (which shows in more detail how the High Needs Block planned budget for 2023/24 has been constructed at individual setting and budget heading level).
- Document PO Appendix 6 (which shows estimated allocations to special schools, special school academies, PRUs and alternative provision academies, as a result of the new condition that is attached to the additional £4.76m High Needs Block funding).

4.1 The Schools Forum is asked to support the Authority to establish the **2023/24 High Needs Block planned budget** by recommending that the formula approach (**the High Needs Funding Model**) the Authority proposed in our consultation, and that was reported back to the Schools Forum on 7 December 2022 (Document PE), is used to delegate High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2023/24 financial year. This approach includes the following significant elements:

- a) The continuation, with uplift (ranging between 3.7% at Band 3L and 1.7% at Band 4H; 1.7% for the Day Rate Model), of our EHCP Banded Model and of our PRU / Alternative Provision Day Rate Model.
- b) The continuation of the existing setting-led need factors as are currently applied to the funding of specialist provisions.
- c) The continuation of the allocation to specialist provisions of 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.
- d) The continuation for an additional year of the SEND Funding Floor mechanism that we first 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 – from median plus 1% to median + 3%) the thresholds that are used to calculate this Floor, in seeking to control the growth in the cost of this mechanism and to better retain the Floor's original purpose, in keeping with the DfE's expectations, which is to support a minority of schools and academies that have significantly greater numbers of pupils on roll with EHCPs. Despite this adjustment, we estimate that the cost of SEND Funding Floor in 2023/24 will be £0.785m higher than the 2022/23 planned budget estimate.
- e) The amendment of 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.

4.2 The Schools Forum is asked to note that we have estimated allocations to special schools, special school academies, PRUs and alternative provision academies, as a result of the new condition that is attached to the additional £4.76m High Needs Block funding that has been allocated, following the 17 November Autumn Statement. Please see Document PO Appendix 6. We estimate that these allocations will cost £1.393m. This is an estimate only, based on the DfE's directed methodology, with final allocations to be confirmed, including following consultation with the recipient settings. The £1.393m however, is included as expenditure within our 2023/24 High Needs Block planned budget. We will present confirmed allocations to the Forum on 8 March.

4.3 The Schools Forum is asked to note and **to give any feedback to the Authority** on the following significant elements, estimates and assumptions, which are incorporated into the construction of the 2023/24 High Needs Block (HNB) planned budget that is presented to this meeting:

- a) The 2023/24 High Needs Block planned budget is calculated without any transfers of funding in from other Blocks or out to other Blocks. The only transfer relates to the contribution to early years SEND support services, which represents a transfer of expenditure (rather than funding) from the High Needs Block to the Early Years Block. Please see section 2 for more details of this transfer.
- b) 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 planning purposes, it is assumed that the £0.920m will continue for a full financial year in 2023/24 and this is built into the planned budget that is presented to this meeting.
- c) We estimate that, in addition to the £0.920m investment, we may need to deploy in the region of £3.280m of surplus balance brought forward within the High Needs Block to fully cover 2023/24 High Needs Block planned budget expenditure. This represents a significant over-spending, which we will need to respond to. The DSG Management Plan, presented in Document PP to this meeting, discusses the position of the High Needs Block in more detail.
- d) The Local Authority continues to take a prudent approach to the setting of the planned budget. The Forum is reminded that High Needs Block expenditure is more difficult to predict than that in other DSG blocks, and is more subject to changes during the year. This difficulty is especially present currently due to the amount of structural change that continues to be delivered, and the scale of growth in the numbers of children and young people with EHCPs.
- e) The 2023/24 planned budget that is presented to this meeting includes £4.23m of revenue budget for the further development of specialist SEND provisions. This is made up of full year (from April: +116 places) and part year (from September: +100 places) budget provision. This provision aligns with the SEND Sufficiency Statement, which was presented to the Forum on 7 December (Document PH). A list of planned commissioned places is presented in Document PP Appendix 1.
- f) The 2023/24 planned budget is constructed to support the building of sustainable capacity for the longer term, by seeking to avoid under-estimating the full final cost (when established and fully occupied) of new places. The planned budget is constructed therefore, on a 'full year full places occupancy' style basis. This is done with the understanding that the filling of newly established or establishing capacity will be achieved in a managed way, and that there will be some degree of fluctuation in the occupancy of both new and existing provisions during the year. Whilst the 2023/24 planned budget includes £4.23m of revenue provision for new specialist places therefore, it is expected that the actual spending on newly created places in 2023/24 will be lower than this, as places will be created and occupied at different points.
- g) Our planned budgets for the 2021/22 and 2022/23 financial years included an earmarked fund of £1.0m, which was to be available to cover further costs that may potentially come from the embedding of our recently amended EHCP Banded Model, especially from the further development of the 'stacking' facility. As our Banded Model will now be into its third year, and recognising that we are already estimating to overspend our High Needs Block allocation, we have removed the £1.0m fund from the 2023/24 planned budget. This means that all unexpected or higher than expected costs, that cannot be met by savings elsewhere within the High Needs Block in 2023/24, will need to be covered by the surplus brought forward balance.
- h) The 2023/24 planned budget for Alternative Provision / PRU provision continues to be based on the principle that our PRU / AP provisions, where funded from the High Needs Block, deliver Local Authority-commissioned provision for pupils permanent excluded. The planned budget for 2023/24 continues not to fund school-commissioned alternative provision. 160 permanent exclusion places are funded within the planned budget for the 2023/24 academic year, compared with 165 places that were funded in the 2022/23 planned budget. The DfE's SEND Green Paper, published in March 2022, proposes some significant changes to the way alternative provision is funded, and to the role of the High Needs Block, with greater emphasis on early intervention (the allocation of funding to prevent permanent exclusion) and movement towards fixed annual budgets for AP providers that are allocated according to a local plan

rather than on numbers of pupils on roll. No changes are made to national systems for the 2023/24 financial year. Our current Day Rate Funding Model incorporates a floor, which ensures a minimum level of funding so that our PRU and AP Academy can retain capacity, irrespective of actual occupancy. This is an area that we will need to closely review, when the DfE announces the 'next steps' in the national SEND Review.

- i) The 2023/24 planned budget continues to be constructed incorporating the financial efficiencies that have come from the amalgamation of Bradford's hospital education, Tracks and medical home tuition provisions into a single Local Authority managed service. The DfE has not yet developed a national formula-based approach to the funding of these provisions, and continues to fund local authorities, through the High Needs Block, on historic information. As such, we receive £2.196m of funding in 2023/24, which is greater than our £1.583m estimated planned budget spending. This currently therefore, is an area of 'gain' for us within the High Needs Block, with this gain supporting other High Needs Block expenditure. However, if and when the DfE alters the national funding methodology, this gain may no longer be present, and the loss of this will increase the financial pressure on the High Needs Block. This is not currently accounted for within the forecast that is presented in Document PP Appendix 2.
- j) The 2023/24 planned budget is based on a general estimate that our spend on: a) pupils with EHCPs in mainstream settings, b) students in post-16 Further Education & SPI settings, and c) pupils placed in independent and non-maintained special school provisions and in out of authority maintained provisions, will continue to grow in 2023/24 at the same rate as in 2022/23, as estimated in December 2022. Simply put, we are estimating that our number of children and young people with EHCPs will continue to grow over the next 12 months at existing rates. Spending in these 3 areas has substantially increased during 2022/23, and combined, these are the major contributors to the forecasted overspending within the High Needs Block, in 2023/24 and on-going. This is discussed further in the DSG Management Plan that is presented in Document PP.
- k) How we propose to continue and to uplift our existing EHCP Banded Model means that separate additional arrangements are not required in order for us to comply with the DfE's Minimum Funding Guarantee for special schools and for special school academies.
- l) Provision for SEND mainstream teaching support services held within the planned budget continues to incorporate the changes in structures that were agreed by the Executive back in 2018. The 2023/24 High Needs Block planned budget includes a large proportion of the £0.920m inclusion investment, as presented to the Schools Forum in July, and also incorporates an adjustment following the transfer of the contribution to early years SEND support services back to the Early Years Block. The total High Needs Block budget provision for these services in 2023/24, is £5.715m. This compares with the 2022/23 adjusted High Needs Block planned budget value of £4.683m (adjusted for the transfer of the early years SEND support services contribution).
- m) As we have previously reported to the Forum, the DfE's national SEND / EHCP / Alternative Provision system and funding reviews are very likely to have significant implications for our High Needs Block income and expenditure going forward. Whilst we have made some small adjustments in approach, which are aimed at supporting transition, for example, our adjustment to our definition of Notional SEND budgets and our control of the growth in cost of the SEND Funding Floor, we have not significantly adjusted our 2023/24 High Needs Block planned budget in anticipation of changes that may come. There are no changes in the national high needs funding system in 2023/24. The DfE currently indicates that an implementation plan for the SEND Green Paper will be published early in 2023. We will need to review this plan closely. In its autumn term messaging to local authorities, about High Needs Block management, the DfE has stressed that the SEND Green Paper represents a longer term programme of change. However, it is quite possible that changes to the high needs funding system may be directed for the 2024/25 financial year. As such, we anticipate that, alongside review work that will be necessary in order to manage our forecasted deficit position, we will also need to review our funding arrangements for 2024/25 in the light of directed changes.

## 5. The Allocation & Retention of Balances forecasted to be Brought Forward from 2022/23 (RECOMMENDATION)

Please refer to Document PM Appendix 2.

5.1 The Schools Forum is asked to support the Authority to establish the **2023/24 DSG planned budget** by recommending the treatment of the £35.665m of balances that are forecasted to be carried forward into 2023/24, as listed and as proposed in the paragraphs below. £35.665m is 5.3% of the estimated 2023/24 DSG allocation.

5.2 In doing so, the Forum is asked to note that the figure of £35.665m is an estimate. The confirmed values of brought forward balances by DSG block will be presented to the Forum initially in July 2023 and then finally in September 2023 (the latter update incorporating the final adjustment to Early Years Block income).

5.3 It is forecasted that a balance of £0.281m will be carried forward from 2022/23 within the **Central Schools Services Block** (CSSB). The Schools Forum is asked to support the Authority's proposals, that:

- a) £0.054m is allocated to the 2023/24 planned budget, to continue existing commitments uplifted for an allowance for pay award and inflation, and to meet the increased cost (+10.6%) of copyright licences for mainstream primary and secondary schools and academies, in combination with the 2023/24 CSSB allocation received from the DfE.
- b) £0.227m is retained in support of CSSB expenditure in future years. In previous years, we have agreed with the Schools Forum that CSSB surplus balances be 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, meaning that the surplus balance that is forecasted to be held within the CSSB at 31 March 2023 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 £0.23m in 2022/23 (reducing to £0.18m in 2023/24).

5.4 It is forecasted that a balance of £4.211m will be carried forward from 2022/23 within the **Early Years Block**. The Schools Forum is asked to support the Authority's proposals, that:

- a) The balance of £0.072m in de-delegated funds is ring-fenced and retained.
- b) 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, and propose to increase the value again to £1,200 in 2023/24, 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 propose 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 £0.120m of the DAF surplus balance to cover the cost of 2023/24 DAF allocations. As such, £0.120m is proposed to be allocated to the 2023/24 Early Years Block planned budget, which leaves a sum of £0.621m that is retained and carried forward.
- c) £0.837m is allocated into the 2023/24 Early Years Block planned budget to support the estimated cost of our Early Years Single Funding Formula (EYSFF), as proposed. Please see section 6. Whether this value of balance is actually needed (or whether a greater or lesser sum is needed) will depend on how spending develops during the year and how this compares against the entitlement delivery estimates used now. This is also subject to the outcomes of our consultation on our EYSFF.
- d) The remaining value of balance, currently estimated to be £2.561m, is retained to be used in support of the cost, including any unexpected or higher than expected cost, of the Early Years Funding Formula (EYSFF) in 2023/24 and going forward. £2.561m is 5.9% of the estimated value of our Early Years Block

in 2023/24. The Authority has sought to explain in our Early Years Single Funding Formula consultation document for 2023/24 (Document PK) the financial position of the Early Years Block, how we are currently managing the structural issues that are present, whilst also continuing to seek to maximise the rates of funding allocated to providers for their entitlement delivery. The availability of reserves will be crucial to how these structural issues are managed and resolved over the next couple of years. The Authority is also conscious that the DfE has not yet confirmed the funding position of maintained nursery schools after 2024/25. Reserves held within the Early Years Block may be needed to support maintained nursery schools through transition that may be required.

5.5 It is forecasted that a balance of £25.830m will be carried forward from 2022/23 within the **High Needs Block**. The following sets out the position of this balance at this time:

- a) 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.
- b) When previously considering the balance held within the High Needs Block, the Forum has agreed with the Authority that this balance should not be allocated in support of on-going expenditure increases or pressures. This is because balances can only be spent once. However, it is not possible / realistic to take this position for the 2023/24 planned budget. We currently estimate that we may need to earmark an additional £3.280m of the balance to establish a planned budget for the High Needs Block for 2023/24 that balances back to zero. In total, with the addition of the £0.920m, we currently estimate that £4.200m (16% 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. £4.23m 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.
- c) On this basis, £21.630m of surplus balance would remain at March 2024. Our updated DSG Management Plan, presented in Document PP, includes 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.
- d) 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 £21.630m 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 £21.630m balance will be supporting the avoidance of cumulative deficit in the High Needs Block over the medium term. We are also conscious of three 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, b) whether we are successful in our bid for a new special school free school, and c) 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, and so reserves will be essential in this context.

5.6 It is forecasted that a balance of £5.343m will be carried forward from 2022/23 within the **Schools Block**. The Schools Forum is asked to support the Authority's proposals, that:

- a) £0.797m is retained as the ring-fenced balance of de-delegated funds. A breakdown of this balance is provided in the separate report (Document PN Appendix 2). Within the 2023/24 planned budget proposals, £0.100m of the £0.797m is specifically earmarked for release to support the cost of the school maternity / paternity insurance fund and £0.122m is earmarked for release to support the cost of the school improvement fund. On this basis, £0.575m is retained and carried forward. However, this balance may also be used to support any costs arising from new deficits held by sponsored primary academy converters, as the Authority proposes that no new value of budget is de-delegated for this purpose in 2023/24. The rest of the balance is ring-fenced and is proposed to be held in support of the cost of continuing de-delegated funds, in line with the principles set out in paragraph 1.2.
- b) £1.320m is retained as the Growth Fund ring-fenced balance and will be used to support the cost of allocations in 2023/24 and on-going. Please see paragraph 1.5.
- c) £0.500m is retained as the ring-fenced balance for the primary phase Falling Rolls Fund. Please see paragraphs 1.9 and 1.10.
- d) £0.397m is allocated to cover the estimated change in the cost of NNDR (Business Rates) for maintained primary and secondary schools for the 2023/24 financial year. However, this is a 'holding position' only, as our Schools Block will be reimbursed for this sum in 2024/25, when we will have a choice about whether the £0.397m is returned to reserves or is allocated through our Schools Block planned budget. Rateable values nationally are being re-valued for April 2023 (5 year scheduled re-evaluation), and costs nationally are increasing by around 15%. NNDR accounting arrangements are now rather complicated. As we are a local authority, that is still uses the 'old' approach to billing for NNDR costs (rather than the ESFA's 'new' approach), whilst the cost of NNDR changes in academies does not affect our Schools Block spending position, changes in costs in maintained schools do, prior to our Schools Block being reimbursed in the following year. The £0.397m is based on an estimate of NNDR costs, and is subject to confirmation.
- e) £1.390m in total is proposed to be allocated into the 2023/24 Schools Block planned budget, in order to afford the mainstream primary and secondary funding formula, as we proposed in our consultation, now using the October 2022 Census dataset. Please see section 7 for further discussion on the allocation of the £1.390m and on the financial position of the Schools Block in 2023/24 following the use of the October 2022 Census dataset. The £1.390m includes the allocation of the £0.421m balance that relates to primary-phase £GUF monies. The £0.421m specifically is allocated to support the cost of the primary-phase funding formula, and to bring the 'excess' cost of this down so that this is equivalent with the secondary-phase.
- f) It is proposed that the remaining value of £0.939m be fully retained as a resilience reserve. £0.939m is 0.2% of the Schools Block.

## 6. Early Years Single Funding Formula and Pro-Forma 2023/24 (RECOMMENDATION)

Please refer to:

- Document PK (EYSFF consultation proposals)
- Document PO Appendix 5 (Early Years Pro-forma, which summarises the proposed setting base rates, the mean Deprivation & SEND rates and maintained nursery school supplement funding).
- Document PO Appendices 2a, 2b and 2c (indicative provider funding rate modelling 2023/24).

6.1 The Schools Forum is asked to support the Authority to establish the **2023/24 Early Years Block planned budget** by giving its formal feedback on the Early Years Single Funding Formula (EYSFF) the Authority proposes to be used to fund all early years providers for their delivery of the 2, 3 & 4-year-old entitlements. The Authority's proposals are set out in detail in Document PK and its Appendix 1 (EYSFF Technical Statement).

6.2 The Authority ideally would like the Schools Forum to give its formal support to these EYSFF proposals.

(BY VOTE – PRIMARY, NURSERY AND EARLY YEARS PVI REPRESENTATIVE).

6.3 In providing feedback now, the Forum is asked to note that, due to the timing of the DfE's announcements on Early Years Block funding arrangements, wider consultation with providers on our 2023/24 EYSFF has not yet begun, but will begin immediately after this Forum meeting. Our consultation will run until 6 February 2023. Final proposals, incorporating any adjustments made in response to consultation feedback, will be presented to Executive on 21 February and then, subject to the Executive's resolution, to Council on 23 February for final decision. The Forum's next scheduled meeting is not until 8 March, so this means that final decisions will be taken before the Forum has had sight of any consultation feedback and any amendments from this. The Authority will send an email to Forum Members as soon as possible after 6 February to inform them whether the final proposed EYSFF, to be presented to the Executive / Council, has changed from what was proposed in Document PK.

6.4 The Schools Forum is reminded and is asked to note:

- a) Local authorities are not permitted to alter their EYSFF arrangements in year without DfE approval.
- b) Deprivation and SEND rates for individual providers will be confirmed once January 2023 postcode data is used to update the Index of Multiple Deprivation 3 year rolling averages. The figures shown in Document PO Appendices 2a, 2b and 2c, and in Document PO Appendix 5, are indicative for this reason. Funding rates are also indicative because they are subject to the outcomes of the consultation.
- c) With the transfer of the Teacher Pay and Pensions Grants for schools and academies into the EYSFF in 2023/24, and the proposed adoption of a Quality Supplement, all maintained schools and academies with nursery schools must now cease to add these grant allocations into their funding forecasts.
- d) A series of estimates have been made in the 2023/24 Early Years Block calculations relating to both income and to the cost of the entitlements (the number of hours to be delivered across the coming year). By necessity, this approach requires end of year reconciliation and may require carry-over of either an under or an over spend into 2024/25.
- e) In previous years, we have established our EYSFF rates of funding incorporating the benefit that comes from our DSG Early Years Block being funded for a greater number of 3&4-year-old entitlement hours than providers actually deliver across the 3 terms. We removed this benefit from our calculations within our 2021/22 and 2022/23 financial year planned budgets. As explained in paragraph 2.2, cautiously, we have assumed that some benefit continues / has returned in the 2023/24 Early Years Block planned budget that is presented to this meeting.
- f) There is no specific unallocated contingency fund held within the 2023/24 Early Years Block planned budget.
- g) We propose in 2023/24 to use a proportion of the Disability Access Fund (DAF) balance that has accrued to help manage the cost of our Early Years Inclusion Fund (EYIF), which is increasing due to a larger number of claims. In practical terms, this means using an estimated £0.120m of the DAF surplus balance to cover the cost of 2023/24 DAF allocations.
- h) As shown in the Pro-Forma (Document PO Appendix 5), our Early Years Block planned budget complies with the DfE's statutory restrictions for the funding of 3&4-year-old hours delivery concerning a) the minimum 95% pass-through and b) the maximum 12% spend on supplements. Our planned budget also complies with the DfE's expectation that the specific Maintained Nursery School Supplement is allocated to protect maintained nursery school funding at pre-national reform (2016/17) rates.
- i) The Local Authority is now working to move schools and academies onto the Provider Headcount Portal for summer term 2023, using this Portal to collect entitlement delivery information (rather than using DfE termly census downloads). PVI providers already use the Portal. The Authority has begun to communicate with schools and academies on this transition.

## 7. Primary and Secondary Formula Funding and Pro-Forma 2023/24 (RECOMMENDED)

Please refer to Document PO Appendix 4 (Primary & Secondary Pro-forma) and Document PO Appendices 1a, 1b and 1c (indicative modelling).

7.1 The Schools Forum is asked to support the Authority to establish the **2023/24 Schools Block planned budget** by recommending the formula approach that the Authority proposed in our consultation, and that was reported back to the Schools Forum on 7 December 2022 (Document PC), is used to calculate core formula funding allocations for mainstream primary and secondary maintained schools and academies for the 2023/24 financial year. This approach includes the following significant elements:

- a) No transfer of budget from the Schools Block to the High Needs Block.
- b) Continue to fully mirror the DfE's National Funding Formula (NFF) at factor level.
- c) Set the Minimum Funding Guarantee (MFG) at positive 0.5%. Within the calculation of the MFG, we continue to exclude premises factors (NNDR Business Rates, split sites and PFI) in the baselines for both 2022/23 and 2023/24, so that we can continue to closely mirror the way the MFG is calculated within the National Funding Formula.
- d) Continue to use our existing local formula approach for the funding of split sites, as this is not yet covered by the National Funding Formula.
- e) Continue to pass through the specific BSF DSG affordability gap values using our current method, continuing the adjustment to ensure that the amounts passed on to academies by the ESFA on an academic year basis are equivalent to the amounts that the Authority requires academies to pay back on a financial year basis. Please see 7.2 below.
- f) Continue to fund NNDR (Business Rates) at actual cost, with the cost currently estimated within the planned budget.
- g) 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.
- h) Retain, with their existing criteria and methodologies, the funds currently managed centrally within the Schools Block – Growth Fund, Falling Rolls Fund, De-delegated Funds.

7.2 The Schools Forum is asked to agree (to recommend) the value of the **DSG's total contribution to the Building Schools for the Future (BSF) Affordability Gap** for 2023/24, which is £8.920m; split £8.003m Schools Block and £0.917m High Needs Block. These figures incorporate an 11.2% increase on 2022/23 for the RPIX. This represents a net increase (allowing for adjustments relating to the apportionment for academies) of £1.159m in cash budget terms on the 2022/23 cost. This contribution will be split between relevant schools and academies on the same % basis as in 2022/23 (based on the school's unitary charge value). For Secondary schools and academies, this contribution is expressed as a formula factor. For Special schools and academies, this contribution is managed as a central item within the High Needs Block.

7.3 As shown in Document PL, the proposed Schools Block planned budget exceeds the 2023/24 DSG Schools Block settlement by £1.787m. The £1.787m is made up of:

- £0.748m overspend in the primary phase formula (this figure is shown in section X of Document PL).
- £0.392m overspend in the secondary phase formula (this figure is shown in section X of Document PL).
- £0.397m increased spending on NNDR (Business Rates) for maintained primary and secondary schools, prior to our Schools Block funding reimbursing in 2024/25.
- £0.303m overspend in cross phase premises factors (the difference between our DSG funding for premises factors and our proposed spend on premises factors).
- £0.053m underspend in cross phase Growth Fund (the difference between our DSG funding for growth and our estimated proposed spend on growth from the 2023/24 planned budget).



In material terms however, the true overspend is £1.390m, because the £0.397m NNDR overspend will be reimbursed in 2024/25.

As in our discussions concerning the 2022/23 planned budget, we have alerted the Schools Forum, and we explained in our autumn consultation for 2023/24, that the affordability of our proposal to continue to fully mirror the DfE's National Funding Formula, with a 0.5% Minimum Funding Guarantee, will depend upon how the dataset taken from the October 2022 Census varies from the October 2021 Census dataset. We have explained how there is an annual lag in pupil circumstances data, between school-level and DSG-level funding, meaning that, if there are significant changes, such as a significant increase in Free School Meals %s in schools and academies, we may not be able to fully afford our formula proposals. We set out in our consultation how we might approach this situation, was it to be present. We explained options, that ranged from using balances brought forward (where the value of over spend was relatively small in the context of the size of the Schools Block) to pro-rata reducing all formula factors to bring the cost of the formula back in line with our available DSG Schools Block funding.

Prior to 2022/23, annual 'data lag' was not really ever a significant issue for us, and certainly not the extent that it caused significant Schools Block affordability issues. However, there appears now to be more 'turbulence' in pupil circumstances data. In 2022/23, the net cost of our formula funding increased by £0.948m when calculated using the October 2021 Census dataset (vs. the 2020 dataset). The main driver of this increase was an increase in the numbers of pupils recorded as eligible for Free School Meals, which we assessed to be a consequence of the COVID-19 pandemic. We managed this £0.948m additional cost within the Schools Block by using Growth Fund headroom, combined with brought forward balances. We did not adjust from our original proposed funding formula.

Document PO Appendix 1d now presents a summary of the changes in costs in 2023/24 by formula factor, when the October 2022 Census dataset is used (rather than the October 2021 Census dataset). This summary evidences that the October 2022 Census dataset has quite significantly altered (and increased in total) the cost of our funding formula in 2023/24. Our cost has increased by £1.074m, with a greater value of cost change in the primary phase (£0.647m) than in the secondary phase (£0.427m). This will be additional funding that is allocated to mainstream primary and secondary schools and academies, in response to the changes in the pupil circumstances data that have been recorded for pupils on roll in October 2022.

Whilst we are concerned about the impact of data lag, for a second year, and whilst we would have preferred not to rely on this value of reserves again to manage this position, on balance, we are of the view that the most sensible, defensible and reasonable approach to take now, as we did in 2022/23, is to use a proportion of the Schools Block brought forward balance to implement our proposals in 2023/24, without alteration. This means that we would fully mirror the National Funding Formula. This will support maximising the funds that are allocated now to schools and academies, who are currently facing financially challenging circumstances. This is what the Authority proposes, and the Schools Forum is asked to support this approach.

Within this proposal for 2023/24, we allocate the remaining £0.421m of primary-phase £GUF monies. The allocation of this to the primary-phase formula brings the overspend in this element of the Schools Block down from £0.748m to £0.326m. £0.326m is broadly equivalent to the £0.392m overspend in the secondary-phase. So, to be absolutely clear with the Schools Forum here – as a result of our proposals, the primary-phase £GUF monies, that have been held within brought forward balances over the last couple of years, will have been fully spent. The Schools Forum is asked to support this approach.

The Schools Forum is asked to note however, that the proposed / preferred approach in 2023/24 does further reduce the value of the reserve balance that we hold within the Schools Block and, as such, were we to face a similar issue in 2024/25 (e.g. a £1m cost of 'data lag'), we might not be able to avoid making formula funding adjustments for affordability reasons. One of the considerations, however, in the favour of using reserves, is that we are only 2-3 more years away from the National Funding Formula, at which point we will not have to locally manage the cost of Schools Block formula funding.

7.4 The Schools Forum is asked to give its final **approval to the Pro-Forma for the 2023/24 financial year**, using the draft pro-forma at Document PO Appendix 4 as a guide.

(RECOMMENDATION BY VOTE – PRIMARY AND ACADEMY; BY VOTE SECONDARY AND ACADEMY).

7.5 The Schools Forum is reminded and is asked to note:

- a) The cost of NNDR (business rates) shown in the Pro-forma is based on estimated figures. The Authority's initial cost estimate for 2023/24 will be subject to changes during the year (with a final reconciliation of actual costs taking place early in 2024).
- b) In moving to using the National Funding Formula at local individual primary and secondary school level, the Schools Forum wished to more closely monitor the actual spending of the Schools Block by phase against the funding received within the Schools Block by phase i.e. phase ring-fencing within the Schools Block. An updated calculation of the position for 2023/24 is shown in section X of Document PL. Forum Members are reminded that premises-related costs and Growth Fund and Falling Rolls Fund costs are funded on a cross-phase basis so are not included in this calculation.
- c) There is no unallocated contingency fund held within the 2023/24 Schools Block planned budget.
- d) On the basis of the modelling presented to this meeting, the formula funding landscape in Bradford in 2023/24 is as follows:
  - Primary phase: 44 out of 156 schools (28%), including academies, are funded on the Minimum Funding Guarantee. 27 schools (17%), including academies, are funded at the £4,405 minimum per pupil level. All other schools and academies are funded above £4,405 per pupil.
  - Secondary phase: 4 out of 31 schools (13%), including academies, are funded on the Minimum Funding Guarantee. 1 academy (3%) is funded at the £5,715 minimum per pupil level. All other schools and academies are funded above £5,715 per pupil.
  - All through academies: None of the 4 academies are funded on the Minimum Funding Guarantee. All of these academies are also funded above their composite minimum per pupil funding levels.
  - In total, 48 out of 191 schools and academies (25%) are funded on the Minimum Funding Guarantee. This is reduced from 73 (38%) in 2022/23. In total, 31 out of 191 schools and academies (16%) are funded on the minimum per pupil funding levels. This is reduced from 36 (19%) in 2022/23.

**Allocations from the Growth Fund 2023/24 Financial Year - Existing & Known Expansions (including Bulge Classes)**

Calculated using the agreed Growth Fund formula

| Phase / Type  | School / Academy                                 | Primary-Phase Bulge or Half Bulge | Expanding - Funding Sept 23 to March 24 | Expanding - Funding Apr 23 to Aug 23 (academies) | 2022/23 FY Total Formula Allocation |
|---|--|-----------------------------------|---|--|-------------------------------------|
| Primary Maintained  | Addingham Primary School                         | £73,322                           | £0                                      | £0   | £73,322                             |
| Primary Maintained  | All Saints' CE Primary School (Ilkley)           | £0                                | £3,168                                  | £0   | £3,168                              |
| Primary Maintained  | Low Ash Primary School                           | £19,009                           | £0                                      | £0   | £19,009                             |
| Primary Maintained  | Poplars Farm Primary School                      | £0                                | £45,939                                 | £0   | £45,939                             |
| Primary Academy   | St Joseph's Catholic Primary, Keighley           | £0                                | £23,762                                 | £17,160  | £40,922                             |
| Primary Maintained  | Steeton Primary School                           | £31,682                           | £0                                      | £0   | £31,682                             |
| All Through Academy (Secondary element)   | Appleton Academy                                 | £0                                | £0                                      | £12,098  | £12,098                             |
| All Through Academy (Secondary element)   | Bradford Girls Grammar (Free School)             | £0                                | £0                                      | £36,294  | £36,294                             |
| Secondary Academy   | Buttershaw Business & Enterprise College Academy | £0                                | £0                                      | £34,782  | £34,782                             |
| Secondary Academy   | Dixons City Academy                              | £0                                | £0                                      | £30,245  | £30,245                             |
| Secondary Academy   | Dixons McMillan Academy                          | £0                                | £0                                      | £36,294  | £36,294                             |
| Secondary Academy   | Dixons Trinity Academy                           | £0                                | £0                                      | £24,196  | £24,196                             |
| Secondary Academy   | Ilkley Grammar School                            | £0                                | £0                                      | £59,650  | £59,650                             |
| Secondary Academy   | Immanuel College Academy                         | £0                                | £0                                      | £103,961   | £103,961                            |
| Secondary Academy   | Trinity Academy Bradford                         | £0                                | £0                                      | £19,659  | £19,659                             |
| <b>Total Gross Cost (prior to reimbursement through recoupment for academies Apr - Aug 5/12ths)</b> |  | <b>£124,014</b>                   | <b>£72,870</b>                          | <b>£374,337</b>                                  | <b>£571,221</b>                     |
| <b>Total Number of Allocations</b>  |  | <b>3</b>                          | <b>3</b>                                | <b>10</b>  | <b>15</b>                           |

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