

**Schools Forum**  
**Wednesday, 12 July 2023 at 8.00 am**

**Venue – Remote Meeting**

<https://bradford.public-i.tv/core/portal/home>

**PLEASE NOTE**

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

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

**1. APOLOGIES FOR ABSENCE**

The Director of Legal and Governance will report the names of alternate Members who are attending the meeting in place of appointed Members.

**2. DISCLOSURES OF INTEREST**

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

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

**From:**  
Asif Ibrahim  
Director of Legal and Governance  
(Monitoring Officer)

**To:**

**Agenda Contact: Asad Shah (Governance Officer)**  
Committee Secretariat, City Hall, Bradford BD1 1HY  
Phone: 01274 432280; E-Mail: [asad.shah@bradford.gov.uk](mailto:asad.shah@bradford.gov.uk)

3. **MINUTES OF 17 MAY 2023 AND MATTERS ARISING** 1 - 8

The minutes of the meeting held on 17 May 2023 be signed as a correct record.

4. **MATTERS RAISED BY SCHOOLS**

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

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

There are no allocations for consideration at this meeting.

6. **SCHOOLS FORUM MEMBERSHIP - UPDATE (i)** 9 - 12

The Business Advisor (Schools) will present a report, **Document QA**, which provides an update on the Forum's membership, continuing from the report (Document PV) that was presented on 17 May 2023.

**Recommended –**

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

(Andrew Redding – 01274 432678)

7. **DEDICATED SCHOOLS GRANT OUTTURN (BALANCES) 2022/23 (i)** 13 - 18

The Business Advisor (Schools) will present a report, **Document QB**, which provides the initial confirmation of carry forward balances held within the Dedicated Schools Grant at the close of the 2022/23 financial year.

**Recommended –**

**The Schools Forum is asked to note the information provided.**

(Andrew Redding – 01274 432678)

8. **EARLY YEARS BLOCK FUNDING & ENTITLEMENT EXTENSION - UPDATE (i)** 19 - 22

The Business Advisor (Schools) will present a report, **Document QC**, which provides an update on the report that was presented to the last

meeting (Document PW) on the extension of the early years entitlements and on the allocation of additional Early Years Block monies for the delivery of the current entitlements from September 2023.

Due to the now anticipated timescale for the announcement, of the value of additional grant that Bradford will receive and the conditions of allocation, we envisage being required to formulate, over the summer holidays, an approach to the allocation of these monies to providers, with this approach being discussed with the Early Years Working Group (beginning 24 July) and then presented to (ratified by) the Schools Forum at the next meeting to be held on 13 September. We will need to give providers an indication of the method of allocation, as early as possible over the summer holidays, to facilitate their financial planning.

**Recommended –**

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

(Andrew Redding – 01274 432678)

**9. FORMULA FUNDING DEVELOPMENT 2024/25 (i)**

23 - 26

The Business Advisor (Schools) and the Principal Finance Officer (Schools) will present a report, **Document QD**, which provides an overview of local formula funding review priorities for the 2024/25 financial year.

**Recommended –**

- (1) The Schools Forum is asked to consider and to note the information provided.**
- (2) Forum Members are invited to (remotely) attend a ‘Formula Funding Working Group’ session, on Wednesday 27 September (8am) or Thursday 28 September (8am) or Tuesday 3 October (8am). As in previous years, these sessions will enable Forum Members to consider in more detail the impact of national formula funding decisions and to explore and guide the proposals for 2024/25 for Bradford’s Schools and High Needs Block formula funding arrangements that are anticipated will be set out for consultation in October.**

(Jonty Holden – 01274 431927)  
(Andrew Redding – 01274 432678)

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

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

Schools Forum membership

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

**The Forum is asked to note the information provided.**

(Andrew Redding – 01274 432678)

**11. ANY OTHER BUSINESS / FUTURE AGENDA ITEMS**

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

**12. DATE OF NEXT MEETING**

The next Forum meeting is planned for **Wednesday 13 September 2023**.

Please note that the planned dates of meetings for the 2023/24 academic year in full are as follows:

- Wednesday 13 September 2023
- Wednesday 11 October 2023
- Wednesday 6 December 2023
- Wednesday 10 January 2024
- Wednesday 17 January 2024 *provisional meeting*
- Wednesday 6 March 2024
- Wednesday 22 May 2024
- Wednesday 10 July 2024

**All meetings will commence at 0800.**

(Andrew Redding – 01274 432678)

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

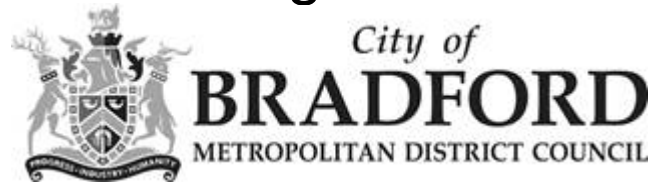
## Signposting of High Needs Information

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

- • SEND Partnership Board (minutes of meetings):

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

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**Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 12 July 2023**

## Schools Forum meeting held remotely on Wednesday 17 May 2023

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

Commenced 08:00  
Concluded 10:25

### 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
Wahid Zaman	Academies Member
Helen Williams	Academies Member
Brent Fitzpatrick OBE	Academies Member
Victoria Birch	Academies Member
Melanie Saville	Academies Member
Sarah Murray	Academies Member
Heather Lacey	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Michelle Farr	Academies Member – Special School Academies
Emma Hamer	Maintained Primary Schools – Governor
Jonathan Nixon	Maintained Primary Schools - Headteacher
Kathryn Swales	Maintained Primary Schools - Headteacher
Lyndsey Brown	Maintained Special Schools - Headteacher

##### APOLOGIES RECEIVED

Member	Membership Group
Amanda Slaney	Academies Member
Bev George	Maintained Nursery Schools – Governor
Graham Swinbourne	Maintained Primary Schools - Headteacher

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

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

Mathew Atkinson	Academies Member
Sian Hudson	Maintained Nursery Schools - Headteacher

**Non-Schools Members**

IN ATTENDANCE

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

APOLOGIES RECEIVED

Member	Membership Group

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Junaid Karim	Council for Mosques (Bradford)

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

Substitute Member	Membership Group

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

Substitute Member	Membership Group
Alison Kay	Academies Member
Katherine Somers	Academies Member

**Local Authority Officers present at the meeting**

Officer	Position
Sue Lowndes	Assistant Director, Education and Learning
Asad Shah	Committee Secretariat
Dawn Haigh	Principal Finance Officer (Schools)
Jonty Holden	Principal Finance Officer (Schools)
Emma Hamer	Strategic Manager, Intelligence and Sufficiency
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 63% of members present (17 out of 27 currently filled membership positions).**

**680. DISCLOSURES OF INTEREST**

Emma Hamer declared an interest in all agenda items.



## 681. MINUTES OF 8 MARCH 2023 & MATTERS ARISING

The Business Advisor (Schools) reported on progress made on “Action” items from the 8 March meeting. He reported that:

- **Item 673 (Falling Rolls Fund):** The Falling Rolls Fund will be discussed further in the presentation of the latest information on the development of the National Funding Formula, which is presented under agenda item 8.
- **Item 675 (Letter to the Secretary of State):** The Forum resolved that the Chair, on behalf of the Schools Forum, writes to the Secretary of State primarily on the issue of the insufficiency of Early Years Block funding. Shortly after the last Schools Forum meeting however, the Government announced more funding for Early Years. The details of this are still to be provided but are imminently expected. So, the letter from the Chair has not yet been sent, as we are waiting for the details of the additional allocations, before framing its content. One aspect, in particular, that we will wish to contain in our letter will be influenced by the extent to which the additional funding is allocated across all local authorities or is (as we would argue it should be) weighted towards the local authorities, like Bradford, that have only received 1% increases in funding rates in 2023/24

The Business Advisor then reported on other matters arising:

- **Scheme for Financing Schools April 2023:** There were no directed revisions to the Scheme for April 2023 and therefore, our Scheme for maintained schools remains unchanged. It has been re-published only to amend Annex 1, which provides an updated list of schools maintained by the Local Authority on 1 April 2023.

**Resolved –**

- (1) That progress made on “Action” items and Matters Arising be noted.
- (2) That the minutes of the meeting held on 8 March 2023 be signed as a correct record.

## 682. MATTERS RAISED BY SCHOOLS

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

## 683. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS

No allocations were presented and no resolutions were passed on this item.

## **684. SCHOOLS FORUM MEMBERSHIP**

The Business Advisor (Schools) presented Document PV, which provided an update on the Forum's membership and composition and how the Local Authority will now seek to refresh the Forum's membership for September 2023. Members were asked to approve the proposed approach to the election of the Chair and Vice Chair of the Schools Forum for the 2023/24 academic year. Forum Members were also asked to consider and to approve Appendix 2 (the Forum's Conduct of Meeting and Procedures document).

Following the presentation of the report, the Chair expressed his appreciation to members for the work that they do and also asked members to encourage any school or academy colleagues that show an interest in the work of the Schools Forum to come forward.

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

### **Resolved –**

- (1) That the information provided in Document PV be noted.**
- (2) The Schools Forum approved the proposed approach to the election of the Chair and Vice Chair of the Schools Forum for the 2023/24 academic year.**
- (3) The Schools Forum approved Appendix 2 (Forum Conduct of Meetings and Procedures) for the 2023/24 academic year.**

**LEAD:**        *Business Advisor, Schools*

## **685. EARLY YEARS BLOCK AND EARLY YEARS ENTITLEMENTS – 15 MARCH BUDGET**

The Business Advisor (Schools) presented Document PW, which provided further details of the Government's 15 March 2023 Budget Statement: on the extension of the early years entitlements, on the allocation of additional Early Years Block monies for the delivery of the current entitlements from September 2023, and on the development of wrap-around provision in schools and academies.

He explained that the detailed information, which is required in order for us to decide our responses to the receipt of additional Early Years Block monies for the period September 2023 to March 2024, which is the most immediate matter, is still to be published by the DfE. We therefore, can only outline at this time how we anticipate these additional monies may be allocated and the wider matters that we need to consider. In its consultative role, we ask for views from the Schools Forum on this outline. He explained that the Authority anticipates presenting a report to the next meeting, which will begin to more closely consider the formula funding changes that may need to be made from, and the financial implications for the DSG and for the Early Years Block of, the extension of the early years

entitlements, beginning at April 2024. This will need to be worked through within our 2024/25 DSG and formula funding decision making cycle.

Following the presentation of the report, the Strategic Manager, Intelligence and Sufficiency, explained that the Authority has drafted a sufficiency and implementation plan for the delivery of the extended entitlements, though this needs to be informed by detailed guidance still to be provided by the DfE. She reported that the Authority is having many conversations with providers. One aspect of feedback from providers so far has been that, if the rate of Government funding is not sufficient to meet the cost of delivering the extended entitlements, providers may either opt out of delivery or may cap numbers, which may have implications for the overall sufficiency of places. Currently, the Authority assesses that we have sufficient places across the District, but this could be affected where providers opt out or cap numbers. The Strategic Manager also highlighted that the Authority will need to closely assess the impact of the entitlement extension on the early assessment of SEND and on the sufficiency of specialist places.

The Chair thanked the Strategic Manager for the work that her team is doing behind the scenes. He asked whether information on sufficiency is available for the Forum to consider. The Chair explained that he wishes the Forum, in its decision making, to have good information on which to take a strategic view about the use of DSG funding and the setting of provider funding rates, so that we, as part of managing the complexities, can avoid decisions that may have unintended consequences for the delivery of the extended entitlements going forward. The Strategic Manager responded that the Council's childcare sufficiency plan is published and that a link can be provided for the minutes, here:

<https://www.bradford.gov.uk/children-young-people-and-families/looking-for-childcare/childcare-sufficiency-assessment/>

The Chair also asked for clarification on whether the £204m for 2023/24 is a one-off or on-going sum. The Business Advisor responded that this is expected to be an on-going sum, though when the 7/12ths figure of £204m is grossed up for the full 2024/25 financial year, we might expect a greater figure than the £288m the DfE states, meaning that the on-going value that this additional funding may have may change.

The member representing special school academies commented that these are complex issues and sought to give some re-assurance that Forum members recognise that the landscape for early years providers is fragile.

**Resolved – That the information presented in Document PW be noted.**

## **686. SCHOOLS BLOCK 'HARD' NATIONAL FUNDING FORMULA 2024/25**

The Principal Officer (Schools) presented Document PX, which provided an update on the DfE's development of the 'hard' National Funding Formula for the Schools Block. He explained that this information is critical in our development of our 2024/25 DSG and formula funding proposals. It is also critical, as the DfE's SEND Green Paper improvement plan, which was published in March 2023,

places emphasis on changes associated with SEND and Alternative Provision funding being managed within the development of the hard National Funding Formula.

Following the presentation of the report, the Chair highlighted for members the summary points on page 34, regarding the implications of the DfE's announcement for the 2024/25 formula funding round, and encouraged members to talk to schools and academies colleagues about these.

A member representing academy special schools expressed concern that the financial position of schools and academies is very fragile, with depleting carry forward surplus balances, and that what appears to be coming in the next few years is very worrying, in terms of the impact that this will have on the quality of education. The Chair responded to acknowledge these concerns, and to explain that the Forum's roles are to help formulate a response, to help colleagues understand what may be coming in the future, and to support the development of a strategic management plan, working within the limitations that are present, such as the quantum of funding available.

**Resolved – That the information presented in Document PX be noted.**

#### **687. MAINTAINED SCHOOLS' OUTTURN (REVENUE BALANCES) 2022/23**

The Business Advisor (Schools) presented Document PY, which provided an overview of the position of revenue balances held by maintained schools at 31 March 2023.

The member representing the teaching trades unions, expressing concern that the financial situation for schools is bleak, asked the Business Advisor whether we have a sense of (whether we can calculate) the amount of additional funding that is needed in order to "resolve the problem". The Business Advisor responded to try to explain that this would be very difficult to calculate. The Chair, using the experience of his school and looking more widely the snap-shot of the value of balances held by schools at the end of the 2022/23 financial year, commented on the scale of growth in costs to school budgets over time, and the insufficiency of funding to match this growth over time, which has contributed to the current and future predicted situation.

**Resolved - That the information presented in Document PY be noted.**

#### **688. HIGH NEEDS BLOCK FINANCIAL FORECAST AND MITIGATION**

The Business Advisor (Schools) presented Document PZ. He explained that the Local Authority presented the latest version of the Authority's DSG Management Plan to the Schools Forum on 11 January 2023. Within this plan, the Authority stated that our forecast identifies 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, and that the risk of cumulative deficit by the end of the 2026/27 financial year is then high. We stated

that our forecast identifies that mitigating action will need to be taken in order to prevent the accrual of a cumulative deficit balance within our High Needs Block, and that this will be a piece of work for the Authority to discuss within the Schools Forum during 2023. We indicated that mitigating action will need to be considered within the 2024/25 DSG and formula funding decision making cycle. The Forum resolved on 11 January, that the Local Authority presents to, and discusses with, the Forum its 'mitigation plan', which is to be developed. Document PZ provides an update and presents the beginnings of the considerations behind the development of 'mitigating' actions, for the Forum's awareness and review.

Following the presentation of the report, the Chair reminded members that the Forum has previously asked for the Local Authority to develop a mitigation plan, as well as a clear strategy for the sufficiency and sustainability of SEND provision and of the High Needs Block. The Chair's suggestion, which was agreed by Forum members, was that a working group of members be convened, at the point the Authority has developed the draft, for the purpose of discussing and reviewing this. The Business Advisor indicated that such a group would be convened early in the new academic year.

The Strategic Manager, Intelligence and Sufficiency, reminded members that, had we been successful in our bid for a special school free school, that this school would not have established for 4-5 years and that the Authority already has in place a strategic plan for the creation of additional specialist places in the short to medium terms, which the Forum has previously received reports on. She did highlight however, that there have been no further announcements from the DfE regarding capital funding for local authorities, and that the sufficiency of capital funding is likely to remain a challenge.

Responding to the report, a member representing academy special schools expressed concern regarding the significant pressures and challenges that schools and academies currently face, and that the DfE's SEND Green Paper only represents a longer term programme of change (not a fix for current issues, which are serious).

Responding to the aspect of the report, which discusses the transfer of monies from mainstream schools and academies (from the Schools Block) to the High Needs Block, an academies member asked whether top slicing schools and academies would just serve to make existing financial stresses worse. Another academies member emphasised that, for schools and academies that are currently on the Minimum Funding Guarantee or Minimum Levels of Funding, top slicing budgets would be very difficult to manage. The Business Advisor responded to explain that he did not foresee that transfer would be an option that would be considered for 2024/25, and also that we need to further consider, as part of the development of the plan, the future conditions under which a transfer would be agreed. He stated that he envisaged that transfer would usually only typically be actioned where mainstream schools and academies directly benefit in return e.g. the transferred funding pays for additional High Needs Block investment that goes back into primary and secondary schools and academies e.g. relating to inclusion or supporting early intervention and alternative provision, or where the funding is used to avoid ceasing or reducing a current High Needs Block funded activity that the mainstream sector benefits from.

**Resolved –**

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

**(2) That a working sub group of Schools Forum members be convened at the point that the Local Authority has developed a draft (or outline) of a strategic mitigation plan.**

**LEAD:           *Business Advisor, Schools*  
*Assistant Director, SEND and Inclusion***

#### **689. SCHOOLS FORUM STANDING ITEMS**

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

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

Forum members welcomed David Johnston's invitation to make a presentation to a future Forum meeting on the work of the Children's and Family's Trust.

#### **691. DATE OF NEXT MEETING**

The next scheduled is Wednesday 12 July. This meeting will be held remotely.

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

## SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

This report provides an update on the Forum's membership, continuing from the report (Document PV) that was presented on 17 May 2023.

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

17 May 2023 (Document PV).

**Background / Context**

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

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

We presented on 17 May the Forum's composition for the 2023/24 academic year and details of the process for renewing / refreshing membership. We also presented the latest version of the Forum's Conduct of Meetings and Procedures document, which will be in place for the 2023/24 academic year.

**Details of the Item for Consideration**

The purpose of this report is to provide an update on the membership of the Schools Forum for the 2023/24 academic year, following the recent 'refresh' processes. We are, unfortunately, not yet in a position to fully confirm membership from September 2023. Work is on-going. The Forum's membership (as it currently stands, pending further confirmations to come) is presented at Appendix 1. However, we ask members to view this as a work in progress. We highlight the following:

- That the changes, confirmations pending and vacancies are highlighted in blue in Appendix 1. Rows without highlight (in white) are continuing and are already confirmed.
- Ian Morrel is confirmed as Chair, and Ashley Reed as Vice Chair, of the Schools Forum for 2023/24.
- Of the 35 positions, 3 are 'not taken' (rather than being vacant). This means that the maximum attendance, for the quorum calculation, is based on 32 positions, prior to adjusting for vacancies.
- Maintained special school and special school academy representation is now confirmed through the 2 academies memberships that are taken by the headteachers of special school academies, as decided by the DAP. This means that the maintained special school membership is 'not taken'.
- We have advertised membership, and have asked for expressions of interest, from the PVI Early Years sector, but have so far not been successful in filling the PVI membership. We will continue to pursue this.
- We expect shortly to confirm the maintained nursery school governor representative, via the process that has been followed by the maintained nursery schools. Bev George is the current representative.
- Following the wider expressions of interest process, we have received new nominations, but we have at this time not filled all vacant positions. Whilst we still work on this, we have not yet confirmed anything to new or existing members. We have presented the current position to the academies CEO Group and also made BSIP aware of the primary maintained membership vacancies. Further conversations will be take place. We do expect that we will have some new members at September 2023 as well as the re-election of existing members. Whilst we have not yet confirmed this to the members themselves, we do anticipate that existing schools and academies members, who are still eligible for their current membership positions i.e. their schools have not converted to academy, and who have put themselves forward, will be 're-elected' for a further two-year term of office. We will communicate confirmations to both existing and new members as soon as possible.
- Heather Lacey, Mathew Atkinson and Andrew Morley, who are existing academies members, have not put themselves forward for re-election and therefore, will retire from the Forum at the end of July.

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

No direct implications

**Recommendations**

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

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

Appendix 1 – Schools Forum Membership September 2023 (pending further confirmations to come)

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

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



Ref	Name of Member	Schools or Non-Schools Member	Membership Group	Location / School / Org	Term of Office End Date	Named Substitutes
1	Sian Hudson	Schools & Academies Member	Maintained Nursery Schools - Headteacher	Executive Headteacher St Edmund's Nursery School & Lilycroft Nursery School	Jul-24	
2	To Be Confirmed (currently Bev George)	Schools & Academies Member	Maintained Nursery Schools - Governor	Governor, Hirst Wood Nursery School	Jul-23	
3	Kirsty Ratcliffe	Schools & Academies Member	Pupil Referral Unit (maintained)	Headteacher, Park Aspire	n/a	
4	Currently Vacant (was Jonathan Nixon)	Schools & Academies Member	Maintained Primary Schools - Headteacher	Currently Vacant	Jul-25	
5	Currently Vacant (was Nicky Kilvington)	Schools & Academies Member	Maintained Primary Schools - Headteacher	Currently Vacant	Jul-25	
6	Graham Swinbourne	Schools & Academies Member	Maintained Primary Schools - Headteacher	Headteacher Stanbury Primary School	Jul-24	
7	Kathryn Swales * (existing member re-elected)	Schools & Academies Member	Maintained Primary Schools - Headteacher	Headteacher, Girlington Primary School	Jul-25	
8	Current Vacant (was Emma Hamer)	Schools & Academies Member	Maintained Primary Schools - Governor	Current Vacant	Jul-25	
9	Ian Morrel	Schools & Academies Member	Maintained Secondary Schools - Headteacher	Headteacher Titus Salt School	Jul-24	
10	Not Taken	Schools & Academies Member	Maintained Special Schools - Headteacher			
11	Richard Bottomley	Schools & Academies Member	Academies - AP Academy	Principal, Bradford Alternative Provision Academy	n/a	
12	Michelle Farr	Schools & Academies Member	Academies - Academy Special School	Principal Co-op Academy Southfield	Jul-25	
13	Lyndsey Brown	Schools & Academies Member	Academies - Academy Special School	Oastler Special School	Jul-25	
14	Amanda Sloney	Schools & Academies Member	Academies	Dixons Academies Trust	Jul-24	
15	Melanie Saville	Schools & Academies Member	Academies	Bradford Academy	Jul-24	
16	Helen Williams	Schools & Academies Member	Academies	Moorlands Learning Trust	Jul-24	Alison Kaye, Moorlands Learning Trust
17	Wahid Zaman	Schools & Academies Member	Academies	Nurture Academies Trust	Jul-24	
18	Sarah Murray	Schools & Academies Member	Academies	Exceed Academies Trust	Jul-24	
19	Brent Fitzpatrick OBE	Schools & Academies Member	Academies	Exceed Academies Trust	Jul-24	
20	Ashley Reed	Schools & Academies Member	Academies	Bradford Diocesan Academies Trust	Jul-24	Carol Dewhirst OBE
21	Michael Thorp * (existing member re-elected)	Schools & Academies Member	Academies	Pennine Academies Yorkshire	Jul-25	
22	Victoria Birch * (existing member re-elected)	Schools & Academies Member	Academies	Beckfoot Trust	Jul-25	
23	To Be Confirmed (was Heather Lacey)	Schools & Academies Member	Academies	To Be Confirmed	Jul-25	
24	To Be Confirmed (was Mathew Atkinson)	Schools & Academies Member	Academies	To Be Confirmed	Jul-25	
25	To Be Confirmed (was Andrew Morley)	Schools & Academies Member	Academies	To Be Confirmed	Jul-25	
26	Currently Vacant (to be confirmed)	Schools & Academies Member	Academies	Currently vacant (to be confirmed)	Jul-25	
27	Currently Vacant (to be confirmed)	Schools & Academies Member	Academies	Currently vacant (to be confirmed)	Jul-25	
28	Currently Vacant	Non-Schools Member	Private, Voluntary & Independent Early Years	Currently vacant	Jul-25	
29	Currently Vacant	Non-Schools Member	16-19 Providers	Currently vacant	Jul-25	
30	Tom Bright	Non-Schools Member	Trades Unions	Trades Unions - Teaching	n/a	
31	Unison (nominee)	Non-Schools Member	Trades Unions	Trades Unions - Non Teaching	n/a	
32	Ruth Terry	Non-Schools Member	Officer for Vulnerable Children	Ruth Terry	n/a	
33	Not Taken	Non-Schools Member	Roman Catholic Diocese (Bradford)	Not Taken	n/a	
34	Not Taken	Non-Schools Member	Church of England Diocese (Bradford)	Not Taken	n/a	
35	Junaid Karim	Non-Schools Member	Council for Mosques (Bradford)	Council for Mosques (Bradford)	n/a	

## Summary of Membership Composition

Total no. of Memberships	35
Total no. of Schools & Academies Memberships	27
Within this - no. of maintained school Memberships	10
Within this - no. of academies Memberships	17
Total no. of Non-Schools Memberships	8
% of Schools Members to Non-Schools Members	77%
Total no. of Governor Memberships (maintained)	2

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## SCHOOLS FORUM AGENDA ITEM

For Action

For Information

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

**This report provides the initial confirmation of carry forward balances held within the Dedicated Schools Grant at the close of the 2022/23 financial year.**

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

Estimates of balances to be held at 31 March 2023 were presented to the Schools Forum on 7 December 2022 and again on 11 January 2023. These estimates were included in the Schools Forum's DSG recommendations and decisions process for the 2023/24 financial year.

**Background / Context**

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

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

Surplus balances brought forward are available to be spent on a one off basis only. The Schools Forum recommended the use / retention of the balances estimated to held at 31 March 2023 at the meeting held on 11 January 2023. £6.998m of balances have been committed for spending within the 2023/24 DSG planned budget. Please see Appendix 1 for the Block distribution of this.

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

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

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

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

### **Background / Context**

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

The statutory basis then, that applies to the 2022/23 DSG account, is that an overall deficit must be carried forward to be dealt with from future DSG income, unless the Secretary of State authorises an authority not to do this, and that authorities are not permitted to fund any part of the deficit from sources other than the DSG (or any specific grants whose conditions allow them to be applied to the schools budget) without the authorisation of the Secretary of State. Bradford's DSG is not in deficit at the end of 2022/23 and there are no additional contributions from non-DSG income sources into the Schools Budget in 2022/23 or in 2023/24.

Through the current DSG Conditions of Grant, the DfE requires local authorities that have an overall cumulative DSG deficit, of 1% or more at the end of the financial year, to submit a report to the ESFA on how this deficit will be recovered. We have previously reported that the DfE has introduced this in the light of the growing number of local authorities setting deficit DSG accounts, largely due to over spending within their High Needs Blocks. 1% of our DSG is roughly £6m. Our DSG account is in surplus at the end of 2022/23.

The DfE also expects all local authorities to regularly present to their School Forums a DSG Management Plan, which sets out the expected future year DSG position and explains the pressures on spending and mitigating actions that are to be taken, especially with reference to high needs provision. We last presented our DSG Management Plan to the Forum on 11 January 2023.

The Schools Forum will receive, as normal in the autumn term and usually in December, an analysis of the forecasted position of DSG balances at the end of the 2023/24 financial year.

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

#### **Summary - Initial Confirmation of DSG Balances Brought Forward from 2022/23**

Appendix 1 presents:

- **The balances by DSG block that were estimated to be held at the end of the 2022/23 financial year – a total of £35.665m.** This estimate was calculated in December 2022 and reported to the Schools Forum within Document PM, presented on 11 January 2023.
- **The actual balances by DSG block that have now been initially confirmed, following the closure of the financial year at 31 March 2023 – a total of £36.692m, representing an additional £1.027m on the estimated figure.** Please note that this is an initial confirmation, which is not yet based on the final Early Years Block funding adjustment, which will be confirmed by the DfE in autumn using our January 2023 Census. Of the £36.692m, £26.594m is held within the High Needs Block.

Members are asked to note:

- £0.870m of the confirmed £5.391m Schools Block balance is attached to maintained school de-delegated funds and is ring-fenced. Members are reminded that the Schools Forum, in its recommendations for the 2023/24 planned budget, released an estimated £0.100m of the forecasted de-delegated funds balance to support the cost of the maternity / paternity scheme for maintained primary schools, and earmarked a further £0.122m to support the cost of the school improvement de-delegated fund in 2023/24.
- £1.320m of the confirmed £5.391m Schools Block balance is attached to the Growth Fund and is ring-fenced.
- £0.500m of the confirmed £5.391m Schools Block balance is attached to the primary phase Falling Rolls Fund and is ring-fenced. We confirmed with the Schools Forum in March that there are no Falling Rolls Fund allocations in 2022/23 and so the full value of the fund is carried forward into 2023/24.

**Details of the Item for Consideration (continued)**

- £0.720m of the £4.475m Early Years Block balance is attached to the Disability Access Fund (DAF) and is ring-fenced, in line with the DfE's expectations. Members are reminded that the Schools Forum, in its recommendations for the 2023/24 planned budget, continued the increased value of DAF allocation per pupil, to support the fuller in year allocation of the DAF funding available. The Forum also agree that, as there is substantial cross-over between DAF and Early Years SEND Inclusion (EYIF) funds, a proportion of the DAF balance that has accrued is allocated in 2023/24 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.
- £0.072m of the £4.475m Early Years Block balance is attached to de-delegated funds and is ring-fenced.
- The difference of + £0.764m in carry forward balance held within the High Needs Block is the cumulative result of differences between the forecasted and actual cost of high needs model allocations, and the cost of other placements and centrally managed services, between December 2022 and March 2023. There continues to be a significant amount of financial movement, which is taking place on a backdrop of the continued growth in the numbers of EHCPs. This movement combines to mean that it is challenging to forecast (based on information available up to November) what the profile of spend will be for the rest of the financial year up to March. Members are reminded that one of our main aims has been to set a High Needs Block planned budget, and to take an approach to forecasting expenditure, which builds sustainable affordable capacity. In terms of the use / retention of this surplus balance, members are reminded of the DSG Management Plan, which was presented to the Schools Forum on 11 January 2023, and also are reminded of the report to the last Forum meeting, which provided an update on the development of a High Needs Block deficit mitigation plan.
- £0.232m surplus balance is held within the Central Schools Services Block (CSSB).

**Recommendations**

**The Schools Forum is asked to note the information presented.**

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

Appendix 1 – Initial Confirmation of DSG Balances held 31 March 2023

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

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## Schools Forum Document QB Appendix 1 12 July 2023

### Initial Confirmation of Dedicated Schools Grant Balances held at 31 March 2023 (at the end of the 2022/23 Financial Year)

Please note that this initial DSG balances statement is only inclusive of an estimate of the final Early Years Block adjustment for 2022/23, which will be confirmed by the DfE in the autumn. Our 2022/23 Early Years Block funding will be adjusted, by the DfE, for the differences between January 2022 and January 2023 Census entitlement numbers for funding relating to the 7/12ths period September 2022 – March 2023. We estimate that this adjustment will be in the region of positive £0.172m. This estimate is included in the Early Years Block figure that is presented in the table below. The final position for the Early Years Block will be confirmed at the next meeting in September.

The individual Schools Block, High Needs Block and Central Schools Services Block balances however, are now confirmed and will not change.

	<b>Schools Block</b>	<b>High Needs Block</b>	<b>Early Years Block</b>	<b>Central Schools Services Block</b>	<b>Total DSG Balances</b>
Forecast (presented 11 January 2023)	£5.343m	£25.830m	£4.211m	£0.281m	£35.665m
<b>Initial Confirmation Presented 12 July 2023</b>	<b>£5.391m</b>	<b>£26.594m</b>	<b>£4.475m</b>	<b>£0.232m</b>	<b>£36.692m</b>
<b>Difference £</b>	<b>+ £0.048m</b>	<b>+ £0.764m</b>	<b>+ £0.264m</b>	<b>- £0.049m</b>	<b>+ £1.027m</b>
<b>Difference as a % of Current DSG Block Value</b>	<b>0.01%</b>	<b>0.7%</b>	<b>0.6%</b>	<b>1.4%</b>	<b>0.01%</b>
Value committed within 2023/24 Planned Budget	£1.787m	£4.200m	£0.957m	£0.054m	£6.998m

Within the Schools Block balance of £5.391m are the following confirmed 'ring-fenced' balances:

- Growth Fund                    £1.320m                    (as forecast)
- Falling Rolls Fund            £0.500m                    (as forecast)
- De-Delegated Funds        £0.870m                    (+ £0.073m on forecast)

Within the Early Years Block balance of £4.475m are the following confirmed 'ring-fenced' balances:

- De-Delegated Funds        £0.072m                    (as forecast)
- Disability Access Fund      £0.720m                    (- £0.021m on forecast)

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## SCHOOLS FORUM AGENDA ITEM

For Action

For Information



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

**This report provides an update (on the report that was presented to the last meeting, Document PW) on the extension of the early years entitlements and on the allocation of additional Early Years Block monies for the delivery of the current entitlements from September 2023.**

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

The Schools Forum made its recommendations on the 2023/24 Early Years Block and Early Years Single Funding Formula on 11 January 2023. An update was presented on 8 March (Document PT). A report on the March Budget announcements was presented on 17 May (Document PW).

**Background**

On 15 March 2023, the Chancellor announced that new entitlements will be introduced in phases:

- From April 2024, all eligible working parents of 2 year olds can access 15 hours per week.
- From September 2024, all eligible working parents of children aged 9 months up to 3 years old can access 15 hours per week. The DfE indicated that the “average rate” of funding for local authorities for the under 2-year-old entitlement will be £11 per hour in 2024/25.
- From September 2025, all eligible working parents of children aged 9 months up to 3 years old can access 30 hours per week.

The Chancellor also announced additional entitlement funding, of £204m from September 2023 rising to £288m in 2024/25, to increase the funding that is paid to early years entitlement providers for the delivery of *the existing entitlements*, above the 2023/24 Early Years Block funding rates that were announced by the DfE on 16 December 2022. At this time, the DfE stated that this additional funding will allow the national average rate for local authorities for 2 year olds to increase by 30%, from the current national average rate of £6 per hour, to around £8 per hour from September 2023. The DfE also stated that the national average rate of £5.29 per hour for 3&4 year olds will rise “in line with inflation to over” £5.50 per hour from September 2023.

In the report we presented to the last meeting (Document PW), we advised that the entitlement funding and extension announcements broadly will mean:

- We will need to closely plan the implementation of the extensions, in line with the DfE conditions and guidance. There is much to consider here, beginning for the 2024/25 financial year. A main aspect of this clearly will be concerned with ensuring the sufficiency of places.
- We will need to closely consider whether our Early Years Single Funding Formula needs to change to absorb effectively the new entitlements, beginning from April 2024.
- We will need to closely consider the knock on financial implications for the DSG where it is appropriate and necessary to increase the size of the Authority’s central capacity, as well as the knock on implications for centrally managed SEND funding streams, including Early Years Inclusion Fund (EYIF) and services that are funded by the High Needs Block.
- We will need to closely consider how new / increased funding and new / increased costs affect the overall affordability position of our Early Years Block. This is in the context of us already using carry forward balances to support our existing level of expenditure. Within this, we need to be careful to understand the financial inefficiencies that may be present during the set-up phases. For example, we have previously identified that, when a new or extended entitlement begins in September, this costs our Early Years Block between September to March more than the funding that we receive from the DfE for the same period.
- We have a more immediate piece of work to complete, and a decision to take, regarding how we allocate the additional monies for the existing entitlements that we expect to receive for the period September 2023 to March 2024.

Regarding the allocation of additional monies for the period September 2023 to March 2024, in the report we presented to the last meeting we also set out, depending on the conditions that the DfE establishes, the principles we expect to follow:

## **Background**

- We absolutely wish to maximise the allocation of the additional funding directly to providers.
- The additional funding will be used to increase provider rates for the autumn 2023 and spring 2023 delivery. However, we will not retrospectively re-calculate the funding that has been allocated for the delivery of the entitlements over the summer term 2023.
- We anticipate allocating the funding across the two entitlements (the current 2-year-old and the current 3&4-year-old entitlement) in a 'ring-fenced' manner, in line with the way that the DfE has allocated the money.
- We anticipate that the additional funding will be allocated to providers by adjusting only the Universal Base Rates.
- We will wish to allocate a total additional value of funding that does not materially affect the overall affordability position of our Early Years Block in the 2023/24 financial year. In January 2023, we agreed with the Schools Forum a planned budget, which set aside £0.957m of brought forward balance to support the full potential cost of our 2023/24 Early Years Block arrangements
- We will need to more closely consider the issue of 'new burdens' related to the additional work, and on-going capacity that the Local Authority will require, to support the roll out and on-going delivery of extended entitlements. However, this is likely to be more appropriate for the 2024/25 DSG decision making cycle rather than more immediate decisions about the allocation of additional monies that have become available during this financial year for the delivery of the existing entitlements.

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

### Allocation of Additional Funding During 2023/24

When we presented the report to the last meeting, we anticipated that the DfE would have published before the 12 July Forum meeting further information regarding the allocation and conditions of the £204m additional early years monies to be available from September. We anticipated that we would have met with the Early Years Working Group and that we would be presenting today a allocation methodology for the Forum's recommendation / ratification.

However, the DfE has not yet published the allocations or the conditions. The DfE has said that:

- The intention is to allocate the additional £204m for the period September 2023 to March 2024 to local authorities via a standalone top-up grant, instead of using the normal route through the Dedicated Schools Grant, to "help reduce complexity for local authorities in passing on the additional funding to providers mid-year".
- The Grant will be called the "Early Years Supplementary Grant" (EYSG).
- Whilst authorities are encouraged to engage with providers in taking decisions about the distribution of the top-up Grant, there will be no requirements for local authorities to formally consult.
- Further details of the EYSG and hourly funding rates will be published "ahead of the summer break".
- For 2024/25, the additional £288m will be allocated to local authorities through the DSG, with 2024/25 funding rates published in autumn 2023 in the normal way. The EYSG therefore, is time-limited.

**Due to the now anticipated timescale, we envisage being required to formulate, over the summer holidays, an approach to the allocation of these monies to providers, with this approach being discussed with the Early Years Working Group (beginning on 24 July) and then presented to (ratified by) the Schools Forum at the next meeting to be held on 13 September. We will need to give providers an indication of the method of allocation, as early as possible over the summer holidays, to facilitate their financial planning.**

### Entitlement Extension – Self Assessment and DfE Support and Monitoring

The minutes of the 17 May meeting record the Forum's initial discussion regarding sufficiency planning in respect of the extension of the early years entitlements, beginning in April 2024. Since this meeting, on 22 June, the DfE has sent local authorities self-assessment forms to complete in respect of sufficiency and readiness for both the extension of the early years entitlements and for the development of wrap-around childcare provision in schools. The DfE has requested self-assessment responses from each local authority by 14 July. The DfE has also provided some early analysis about supply and demand for the expanded entitlements, and the number of schools that are recorded as currently supplying wraparound children on school sites. We are currently reviewing the DfE supply and demand data against the data we hold. The DfE has stated that its intention is to issue the self-assessments on a termly basis. We will continue to talk to the Schools Forum about sufficiency planning within our discussions on the financial DSG management of the entitlement extensions.

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

In January 2023, we agreed with the Schools Forum a planned budget, which set aside £0.957m of brought forward balance to support the full potential cost of our 2023/24 Early Years Block arrangements.

Regarding the on-going financial DSG implications (post 2023/24), we will need to further consider not only the allocation of Early Years Block funding to entitlement providers, but also the implications for the financing of additional central capacity that is likely to be needed to support the extension of the entitlements, as well as wider DSG implications that extension may have, especially from supporting early years children with SEND, through Early Years Inclusion Funding EYIF) as well as via allocations and support services that are funded from the High Needs Block.

**Recommendations**

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

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

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 provides an overview / introduction to local formula funding review priorities for 2024/25.**

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

The Schools Forum made its recommendations on the 2023/24 DSG and formula funding arrangements on 11 January 2023.

**Background / Context**

See the details for consideration below.

**Details of the Item for Consideration**

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

**Overall Guiding Context 2024/25**

We have made a number of changes to our formula funding approaches across all the DSG Blocks, since the beginning of National Funding Formula-based arrangements. We expect that our recent decisions and actions will inform how we will respond to announcements concerning the 2024/25 DSG and formula funding arrangements and changes.

From recent consultations and announcements, we know that significant changes in DSG management, decision making and formula funding are on the horizon. In particular, the final establishment of the hard National Funding Formula within the Schools Block, the implementation of the outcomes of the national SEND Review, and the extension of the early years entitlements, will have implications for the whole DSG, for formula funding arrangements and decision making, as well as for the budgets of individual schools, academies and other providers, including early years providers. The extent to which these changes will materially affect our 2024/25 financial year formula funding arrangements might be limited, with the weight of further changes possibly coming after 2024/25. However, we must continue to operate our local arrangements within ever tightening regulations and with an eye to ensuring that we follow (or at least do not go against) the 'direction of travel', so as to minimise the extent to which any decisions we take locally will cause turbulence in the near future. This being said, we do expect to have to manage certain specific changes in our arrangements in 2024/25, such as in Growth and Falling Rolls Funding within the Schools Block.

From the Chancellor's Autumn Spending Statement October 2022, we expect that the growth in the 2024/25 financial year DSG settlement (vs. 2023/24) will be 'more modest' than has been seen in recent years. The DfE may review this position, in the light of the current financial climate (and discussions on pay awards). However, we will not know this until the settlements are announced and so must currently plan on the basis of previous guidance. Generally, a lower settlement means that we will have less headroom available on which to set our formula funding arrangements for 2024/25. We expect that reducing early years entitlement and primary-phase pupil numbers will also contribute to a reduced amount of headroom, especially in the Early Years and Schools Blocks. However, reducing numbers will also affect the High Needs and Central Schools Services Blocks. In this context, Forum members are reminded that, in establishing the planned budget for 2023/24, we allocated one off monies (reserves) to all 4 DSG Blocks, including £1.79m to the Schools Block, £0.96m to the Early Years Block and £4.2m to the High Needs Block, in order to fund our formula funding arrangements. We also currently estimate that our High Needs Block will be in deficit by the end of 2025/26.

In advance of further announcements, at this stage, we anticipate that the 2024/25 DSG setting and formula funding round will be challenging.

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

### Schools Block 2024/25

For 2024/25, the DfE has already announced the following:

- There will be further tightening of the Regulations, which will require local authorities to move closer to the National Funding Formula (NFF) for the calculation of budget shares for their mainstream primary and secondary schools and academies. As we are currently mirroring the NFF, and have done since 2018/19, we do not anticipate that this will require substantial new response.
- The Mainstream Schools Additional Grant (MSAG) will be amalgamated into the NFF and will cease as a separate grant. We expect that the MSAG will be merged into the base £app, lump sum, and FSM6 formula factors (as was the case for the Supplementary Grant in 2023/24).
- A new mandatory NFF-led split sites factor will be implemented. Individual schools and academies will be protected against losses via the Minimum Funding Guarantee.
- Amended (more consistent, but more flexible and more 'fit for purpose') Growth Fund and Falling Rolls Fund arrangements will be established. The way these two funds are financed at Schools Block level will change. We will need to review both our Growth and Falling Rolls Funds, in line with the DfE's changes, as well as review their affordability. This potentially will be a major area of change.
- That the guidance for local authorities regarding the definition of Notional SEND budgets may be strengthened. We won't know the details of this until the DfE publishes the Schools Block operational guidance. However, we have already identified that it may be helpful, in the transition to the hard NFF, for us to annually incrementally adjust our definition.

Other specific matters that we will need to continue to consider and also that may come out of the publication of the DfE's operational guidance are:

- The absorption and impact of any wider changes in the NFF that is constructed by the DfE. We may reasonably expect the DfE to make adjustments to the primary and secondary NFF weightings and variable values, so as to maintain the distribution of funding at national level, when using updated October 2022 Census data. We also know that the DfE is currently reviewing the relative values of each of the NFF factors, but especially the value of the prior-attainment factor, which has been affected by the COVID-19 pandemic as well as by changes in assessments. This may have implications for individual school and academy allocations. We know that the Minimum Funding Guarantee (MFG) will continue, which will provide protection, but we are not yet clear how the MFG can be set and what level will be affordable. We also currently do not know the level of the Minimum Level of Funding.
- The affordability of our Schools Block arrangements in relation to the impact of the 'lag' in data between DSG-level funding and school-level formula funding. We used £1.79m of reserves to afford the full mirroring of the NFF in 2023/24. We do not have the same value of uncommitted reserves left within the Schools Block to employ again, should the cost of data lag for 2024/25 be similar to the cost in 2023/24. In this scenario, we would be looking at alternative ways of reducing the cost of our Schools Block funding formula to bring this in line with the value of Schools Block funding that is available.
- The de-delegation of funds from maintained schools, which is subject to annual review.

### Early Years Block 2024/25

It is expected that local authorities will continue to exercise control over their funding of the early years entitlements, via the Early Years Block. The DfE's movement to hard National Funding Formula does not extend to the Early Years Block. There are significant restrictions in place already, which control how local authorities fund providers for their delivery of the entitlements. These restrictions could be (are likely to be) altered or increased in 2024/25, especially in the context of the extension of the entitlements across 2024/25 and 2025/26. Please see Documents PW and QC for further discussion on the types of changes that might be required following the entitlement extensions, and wider DSG implications.

Subject to further announcements by the DfE, the principal technical EYSFF (Early Years Single Funding Formula) matters that we envisage we will need to consider for 2024/25 are:

- Establishing for the first time the Universal Base Rates for the funding of the extended 2-year-old entitlement and for the new 9 months to 2-year-old entitlement.
- Reviewing whether the extended and new entitlements should be funded using Supplements e.g. a Deprivation Supplement, and establishing these where necessary.

### Details of the Item for Consideration

- Whether our current 3 terms arrangement, as a way of counting individual provider entitlement delivery, will be an accurate and appropriate way of counting the delivery of the extended and new 9 months to 2 years entitlements.

Regarding other technical EYSFF matters, for 2024/25:

- We will need to consider the implications of the entitlement extensions on our Early Years Inclusion Fund (EYIF).
- Within our consultation on 2023/24 financial year EYSFF arrangements, we signalled that we would wish to review the on-going position of the Teacher Employers Contribution Pensions Supplement, which was newly established at April 2023 following the transfer into the Early Years Block of the former Teacher Pay and Pensions Grants that were received by maintained schools and academies.
- The DfE has already confirmed the continuation of the Maintained Nursery School supplement in 2024/25, so we expect to continue to protect the funding of nursery schools as we do currently.

There are then two other on-going significant matters that we will need to consider within our proposals for 2024/25. These are more focused on values of rates of funding that our EYSFF allocates to providers, than technical changes in how our EYSFF operates.

- Our spending on the existing 2-year-old offer currently exceeds the funding we receive in the Early Years Block specifically for the 2-year-old offer. This places financial pressure on the Early Years Block, as well reduces the funding that is available to support the 3&4-year-old entitlement.
- Our spending on the Deprivation and SEND Supplement within the 3&4-year-old EYSFF. In 2023/24, we took 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 second step in 2023/24 has reduced spending from 8.00% to 7.00%. We stated in our 2023/24 consultation that the third step will be further reviewed and discussed in our consultation to be published for 2024/25 arrangements. We 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 and we stated that we are very likely to propose this in our 2024/25 EYSFF arrangements.

### High Needs Block 2024/25

In recent years we have made some significant changes to our formula funding of high needs:

- At April 2020, we introduced a new Banded Model for the allocation of 'top up' funding for EHCPs. We also introduced a new Day Rate Model for the funding of the PRUs / Alternative Provision Academies for pupils permanently excluded. These models have since been consolidated and uplifted.
- In 2021/22, we introduced an amended SEND Funding Floor for mainstream primary and secondary schools and academies. We have continued the Floor mechanism in 2022/23 and in 2023/24.
- In 2023/24, we adjusted our definition of Notional SEND for mainstream schools and academies.

Although significant changes are on the horizon, it is not yet clear the extent to which the SEND review reforms will impact on 2024/25 high needs formula funding arrangements. This should become clearer as operational guidance is published for local authorities, from July. We anticipate that the DfE may adjust again its guidance in relation to the determination of notional SEND budgets for mainstream schools and academies. However, we assess that the more significant structural changes that are proposed (or that are "hinted at") in the DfE's review document will not be implemented before April 2025. At we reported to the Forum at the last meeting, Document PZ, in its recent messaging to local authorities, the DfE has stressed that the SEND Green Paper represents a longer term programme of change.

Pending further guidance from the DfE, which we will need to respond to as necessary, whilst the Authority has committed to the development of a High Needs Block deficit mitigation plan, and notwithstanding that technical changes may be made in future years, and that these changes may incrementally begin in 2024/25, we do not envisage making immediate substantial technical changes to our high needs formula funding approaches in 2024/25. However, we anticipate that a most pressing issue for our high needs formula funding arrangements will be their affordability within the 2024/25 High Needs Block funding envelop. In this regard, we are likely to need to exercise restraint, especially in determining the levels of any increases in EHCP top-up funding in 2024/25. We are also likely to need to continue to exercise restraint with the aim of managing the cost of the SEND Funding Floor. This restraint will be discussed 'in the round' with the Schools Forum in the autumn term and as part of our formula funding consultations and within our discussions on our High Needs Block deficit mitigation plan.

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

#### **Timetable**

At this time, we anticipate following the timetable that we have used in previous years for the development of consultation, and decision making, on DSG formula funding arrangements for 2024/25.

This begins by inviting Forum Members to attend one of 3 Formula Funding Working Group sessions that have been arranged for Wednesday 27 September (8am), Thursday 28 September (8am) or Tuesday 3 October (8am). As last year, these sessions will enable Forum Members to consider in more detail the impact of formula funding decisions and to explore and guide the proposals for 2024/25 that are anticipated will be set out for consultation in October. It is expected that these sessions will be held remotely.

The Early Years Working Group has been convened (meeting on 24 July) and will continue to meet to more closely consider the Early Years Single Funding Formula (EYSFF) for 2024/25.

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

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

### **Recommendations**

- (1) The Schools Forum is asked to consider and to note the information provided.**
- (2) Forum Members are invited to (remotely) attend a 'Formula Funding Working Group' session, on Wednesday 27 September (8am) or Thursday 28 September (8am) or Tuesday 3 October (8am). As in previous years, these sessions will enable Forum Members to consider in more detail the impact of national formula funding decisions and to explore and guide the proposals for 2024/25 for Bradford's Schools and High Needs Block formula funding arrangements that are anticipated will be set out for consultation in October.**

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

None

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

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