

**Schools Forum**  
**Wednesday, 6 December 2023 at 0800**

**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 Business Advisor (Schools) 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 11 OCTOBER 2023 & MATTERS ARISING MINUTES** 1 - 12

That the minutes of the meeting held on 11 October 2023 be signed as a correct record.

(Asad Shah – 01274 432280)

4. **MATTERS RAISED BY SCHOOLS**

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

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

13 - 16

As presented in **Document QM**, Forum Members are asked to agree newly proposed allocations, from the 2023/24 Schools Block Growth Fund, to maintained secondary schools and to secondary academies.

**Recommended –**

- (1) **The Schools Forum is asked to agree to allocate a total of £808,929 from the Growth Fund in 2023/24 to maintained secondary schools and secondary academies, as set out in Document QM. \***
- (2) **Members are asked to note that an indicative total sum of £1,110,677 of surplus balance of Growth Fund is ring-fenced and is forecasted to be carried forward into 2024/25 within the Schools Block. The Schools Forum will be asked to consider the allocation and / or retention of this balance at the meeting on 10 January. \***

*\* Please note that 6 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 10 January will confirm these allocations and the total Growth Fund spend and balance to be carried forward.*

(Andrew Redding – 01274 432678)

6. **BRADFORD CHILDREN AND FAMILY TRUST (I)**

The Executive Director, Social Care and Practice, will present an overview and update on work of the Children and Families Trust. This presentation was accepted by the Forum as an AOB item in the May 2023 meeting.

7. **EARLY YEARS BLOCK SETTLEMENT & EYSFF CONSULTATION 2024/25 (I)**

17 - 20

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

We are working to present a consultation document to the Forum's

meeting to be held on 10 January. On this basis, our period of consultation on the 2024/25 EYSFF will need to extend beyond the 10 January (the meeting at which the Schools Forum makes its recommendations on the 2024/25 DSG and formula funding arrangements). As we have done in the last few years therefore, we anticipate presenting to the Forum on 10 January a planned Early Years Block budget for 2024/25, which will be based on assumptions and estimates that are made prior to the completion of our consultation.

**Recommended –**

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

(Andrew Redding – 01274 432678)

**8. CONSULTATION OUTCOMES - SCHOOLS BLOCK FORMULA FUNDING 2024/25 (I)** 21 - 22

The Business Advisor (Schools) will present a report, **Document QO**, which asks Members to consider the feedback received to the consultation on our 2024/25 Schools Block formula funding arrangements and Schools Block centrally managed funds.

**Recommended –**

- (1) The Forum is asked to consider the responses received to the consultation and whether any of the proposals on the 2024/25 primary and secondary mainstream funding formulae, or Schools Block centrally funds and criteria, should be changed in the light of these responses.**
- (2) Members are asked to note that they will be asked to make final recommendations on the Schools Block formulae, and the criteria for the allocation of Schools Block central funds, on 10 January. As such, Members are asked to consider whether sufficient information has now been provided to enable these recommendations to be made.**

(Andrew Redding – 01274 432678)

**9. INDICATIVE BUDGETS 2024/25 PRIMARY & SECONDARY SCHOOLS AND ACADEMIES (I)** 23 - 32

The Business Advisor (Schools) will present a report, **Document QP**, which provides Members with updated indicative modelling of mainstream Primary & Secondary formula funding delegated budget shares for 2024/25, now using the pupil numbers taken from the October 2023 Census. This modelling is tabled only for information at

this stage, prior to asking Members to make final recommendations on 10 January.

**Recommended –**

- (1) **The Forum is asked to note the Primary and Secondary modelling information. A further update will be provided on 10 January, when Forum Members will be asked to make final recommendations on the values of funding allocated via each formula factor.**
- (2) **Members are asked to consider whether sufficient information has been provided to enable final recommendations to be taken on 10 January on the matters presented in this report.**

(Andrew Redding – 01274 432678)

**10. CONSULTATION OUTCOMES - HIGH NEEDS BLOCK FORMULA FUNDING 2024/25 (I) 33 - 34**

The Principal Finance Officer (Schools) will present a report, **Document QQ**, which asks Forum Members to consider the feedback received to the consultation on the 2024/25 High Needs Funding Model.

**Recommended –**

- (1) **The Forum is asked to consider the responses received to the consultation and whether any of the proposals on the 2024/25 high needs funding formulae, should be changed in the light of these responses.**
- (2) **Members are asked to note that they will be asked to make final recommendations on High Needs Block formula funding on 10 January. As such, Members are asked to consider whether sufficient information has now been provided to enable these recommendations to be made.**

(Dawn Haigh – 01274 433775)

**11. 2024/25 DSG UPDATE (I) 35 - 40**

The Business Advisor (Schools) will present a report, **Document QR**, which provides a summary-level indicative forecast of the Dedicated Schools Grant (DSG) income / expenditure position for the 2024/25 financial year.

**Recommended –**

**Members are asked to consider the information presented in the report, for reference, in advance of the 10 January meeting.**

(Andrew Redding – 01274 432678)

**12. 2023/24 DSG SPENDING AND CARRY FORWARD BALANCES FORECAST (I) 41 - 52**

The Business Advisor (Schools) will present a report, **Document QS**, which updates Members on the forecasted spending positions of each of the DSG Blocks against the 2023/24 planned budget. This document gives Members a view of the estimated values of balances to be carried forward into 2024/25 and a view of the uses of these balances.

**Recommended –**

**Members are asked to consider whether sufficient information has been provided to enable final recommendations to be made at the meeting on 10 January on the allocation and / or retention of estimated DSG balances.**

(Andrew Redding – 01274 432678)

**13. ANNUAL SEND PLACES SUFFICIENCY STATEMENT (I) 53 - 54**

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

This statement is presented as per the schedule of high needs information, which was agreed with the Schools Forum on 14 October 2020. It is presented in advance on an update of the fuller DSG Management Plan, which will be presented on 10 January.

**Recommended –**

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

(Emma Hamer – 01274 439535)

**14. CENTRAL SCHOOLS SERVICES, EARLY YEARS & SCHOOLS BLOCK FUNDS (I) 55 - 68**

The Business Advisor (Schools) will present a report, **Document QU**, which asks Forum Members to further consider the Authority's proposals for retention of Schools, Central Schools Services and Early Years Block central and de-delegated items in the 2024/25 financial year, following the initial discussion had in the last Forum meeting and

in advance of the 10 January.

**Recommended –**

- (1) Members are asked to note the information provided in the report.**
- (2) Members are asked to consider whether any further information is needed to enable final recommendations and decisions to be taken / made on 10 January on the funding of centrally managed and de-delegated Early Years, Schools, and Central Schools Services Block items in 2024/25.**

(Andrew Redding – 01274 432678)

**15. 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)

**16. AOB / FUTURE AGENDA ITEMS**

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

**17. DATE OF NEXT MEETING**

Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 10 January (City Hall).

A provisional meeting is scheduled for Wednesday 17 January (if this is needed to complete 2024/25 DSG recommendations).

For planning purposes, the provisional schedule for Schools Forum meetings for the 2024/25 academic year has now been set, as follows:

- Wednesday 11 September 2024, 8am
- Wednesday 9 October 2024, 8am
- Wednesday 4 December 2024, 8am
- Wednesday 15 January 2025, 8am
- *Wednesday 22 January 2025, 8am (provisional meeting)*
- Wednesday 12 March 2025, 8am
- Wednesday 21 May 2025, 8am
- Wednesday 9 July 2025, 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

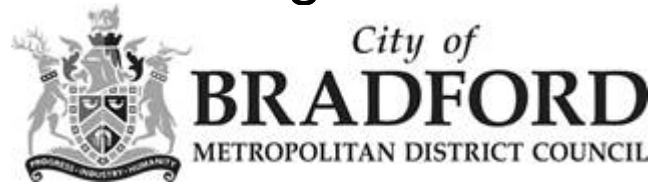
As per the schedule presented on 14 October 2020, “Forum members are expected to access ‘outside of the Forum meetings’ wider SEND information that is presented to other groups and that is already published, including information presented to the SEND Partnership. The Authority will signpost this information (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 6 December 2023**

## Schools Forum meeting held remotely on Wednesday 11 October 2023

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

Commenced 08:00  
Concluded 10:00

### RECORD OF MEETING ATTENDEES, APOLOGIES AND ABSENCES

#### Schools & Academies Members

##### IN ATTENDANCE

<b>Member</b>	<b>Membership Group</b>
<b>Ian Morrel (Chair)</b>	<b>Maintained Secondary Schools – Headteacher</b>
Ashley Reed (Vice Chair)	Academies Member
Wahid Zaman	Academies Member
Amanda Sloney	Academies Member
Jonathan Nixon	Academies Member
Rowena Dixon	Academies Member
Matthew Hill	Academies Member
Brent Fitzpatrick OBE	Academies Member
Sarah Murray	Academies Member
Melanie Saville	Academies Member
Lyndsey Brown	Academies Member - Special School Academies
Sian Hudson	Maintained Nursery Schools - Headteacher
Graham Swinbourne	Maintained Primary Schools - Headteacher
Kathryn Swales	Maintained Primary Schools - Headteacher
Helen Willett	Maintained Special Schools

##### APOLOGIES RECEIVED

<b>Member</b>	<b>Membership Group</b>
Victoria Birch	Academies Member
Helen Williams	Academies Member
Michael Thorp	Academies Member
Isabel Peat	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Bev George	Maintained Nursery Schools – Governor
Victoria Merriman	Maintained Primary Schools - Headteacher

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

<b>Member</b>	<b>Membership Group</b>
Jon Skurr	Academies Member
Kirsty Ratcliffe	Pupil Referral Unit (maintained)

**Non-Schools Members**

IN ATTENDANCE

<b>Member</b>	<b>Membership Group</b>

APOLOGIES RECEIVED

<b>Member</b>	<b>Membership Group</b>
Tom Bright	Teaching Unions
Ruth Terry MBE	Officer Representing Vulnerable Children

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>
Adrian Coghill	Teaching Unions
Louise Sagar	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>
Asad Shah	Committee Secretariat
Niall Devlin	Assistant Director, SEND and Inclusion
Marium Haque	Strategic Director
Dawn Haigh	Principal Finance Officer (Schools)
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).**

**716. DISCLOSURES OF INTEREST**

No interests were declared.

## 717. MINUTES OF 13 SEPTEMBER 2023 & MATTERS ARISING

In introducing the meeting, the Chair welcomed Victoria Merriman as a new member to the Forum. The Chair alerted members to the DfE's error and revision, published on 6 October, of the 2024/25 financial year Schools Block funding settlement and National Funding Formula and thanked the Business Advisor (Schools) and his team for responding swiftly to provide amended modelling to this meeting.

The Business Advisor (Schools) reported on progress made on "Action" items from the 13 September meeting. He reported that:

- **Item 707 (Early Years Supplementary Grant):** A document is included in the meeting reports pack under matters arising, providing an initial response to the question that was asked at the last meeting about why Bradford's EYSG allocation is below national medians. This is a holding response pending further information to be presented to a future meeting.
- **Item 708 (Early Years Block funding):** an update will be provided verbally to this meeting.
- **Item 709 (DSG and Formula Funding Announcements):** The briefing note that was tabled to the September meeting (Document OG) is included again in the reports pack for this meeting as a useful point of reference for members. However, due to the DfE's error and amendment of the 2024/25 Schools Block funding settlement and National Funding Formula, elements of this note are now inaccurate and are replaced by the additional briefing note, which is presented to this meeting.
- **Item 710 (Formula Funding Arrangements & Consultations):** The Schools Block and High Needs Block consultations are presented to this meeting. We ran 3 FFWG sessions, which were attended by 10 members and substitute members.
- **Item 711 (High Needs Block Forecast and Mitigation Plan Development):** A small number of members have contacted me to sit on the working group. This group will be convened shortly.

**Resolved –**

- (1) That progress made on "Action" items and Matters Arising be noted.**
- (2) That the minutes of the meeting held on 13 September 2023 be signed as a correct record.**

## 718. MATTERS RAISED BY SCHOOLS

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

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

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

## **720. CONSULTATION – PRIMARY AND SECONDARY MAINSTREAM FORMULAE & SCHOOLS BLOCK MATTERS 2024/25**

The Business Advisor (Schools) presented a report, Document QJ, which asked the Schools Forum to consider the consultation document, which outlines the proposals for the Schools Block, the funding formula to be used to calculate allocations for mainstream Primary and Secondary schools and academies for the 2024/25 financial year, and the criteria that will form the basis of the allocation of additional funding to maintained schools (and academies where appropriate) from Schools Block centrally managed funds. The Business Advisor explained that the Authority would like now to consult on these proposals. The feedback from this consultation will be presented to the Schools Forum on 6 December. The Forum will then be asked to give its final views (its recommendations) on 10 January 2024.

However, the Business Advisor also explained that the figures contained within the consultation document included in the agenda pack, and the modelling, is revised as a result of the DfE's publication on 6 October, where the DfE has explained that an error has been made by DfE officials in the calculation of the 2024/25 Schools Block settlement and National Funding Formula, to the extent that the allocations per pupil that will be received by all local authorities and all schools and academies through the National Funding Formula in 2024/25 are now lower than the allocations that were announced on 19 July. For Bradford, the difference is 0.9% / £4.5m in cash terms. The Business Advisor referred to the additional briefing note, which has been sent to members, which explains the differences in the settlement and provides further updated modelling. He clarified that the regulations, framework and technical construct of the Schools Block and National Funding Formula in 2024/25 are still as published on 19 July. What has changed is the value of funding that is allocated. This makes the 2024/25 settlement a much leaner settlement for mainstream primary and secondary schools and academies.

In responding to the Business Advisor's presentation, members asked the following questions and made the following comments:

- A number of members expressed their disappointment, dissatisfaction and concern regarding this position. Firstly, the additional work that this error has caused / will cause, both for the Local Authority as well as for schools and academies, where budget planning and decision making for 2024/25 will now need to be substantially revised. This is at a time when the DfE is pushing for reducing workload on schools. Secondly, that this is now a lower settlement in per pupil terms than was previously announced, meaning that school and academy budgets will be directly negatively affected.
- The Strategic Director asked members to consider how the Forum should communicate this situation to schools, but also how to communicate to the

DfE the Forum's concern and dissatisfaction. Following discussion on this, members resolved that the Chair further discusses with the Business Advisor how to express the Forum's concerns (such as in a letter to the Secretary of State copying in our local MPs). The Business Advisor also informed the Forum that a note on this issue has already been published on Bradford Schools Online. He offered the view that the best way of communicating the revision of the settlement is through the detailed consultation document, which is planned to be published (subject to the Forum's approval) immediately after this meeting.

- An academies member asked for clarification on whether the transfer in of the Mainstream Schools Additional Grant (MSAG) inaccurately enhances the value of the per pupil funding increase this is actually being received by schools and academies next year. The Business Advisor clarified that this isn't the case as, within the year-on-year funding comparisons, MSAG is included in both 2023/24 and 2024/25 figures.

**Resolved –**

- (1) That the Consultation - Primary and Secondary Mainstream Formulae & Schools Block Matters 2024/25 be published.**
- (2) That the Chair and the Business Advisor (Schools) communicate (including to the DfE and to local MPs) the Forum's disappointment and concern regarding the DfE's revision of the 2024/25 Schools Block National Funding Formula settlement.**

**721. CONSULTATION – HIGH NEEDS BLOCK FUNDING FORMULAE 2024/25**

The Principal Finance Officer (Schools) presented a report, Document QK, which asked the Schools Forum to consider the consultation document, which outlines the formula approach that the Authority proposes to use to delegate High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2024/25 financial year April 2024 to March 2025. The Authority would like now to consult on these proposals. The feedback from this consultation will be presented to the Schools Forum on 6 December. The Forum will then be asked to give it final views (its recommendations) on 10 January 2024.

The Principal Officer took members through the main points of the consultation document, especially focusing on the uplift of the Banded Model and the methodology for this. In response to this presentation, members asked questions and made comments, which were generally focused on the overall position of Bradford's High Needs Block and the level of uplift that is proposed in 2024/25 in the context of the challenges that are faced by schools:

- A member representing maintained primary school headteachers asked why EHCP top-up funding amounts, as proposed, are not increasing at the same rate as inflation, and why element 2 remains at £6,000, especially when the High Needs Block currently holds a significant surplus balance. An academies

member added to this question, to stress that schools as well as the Local Authority are under financial pressure and a consequence of the Authority's proposals is that schools will apply back to the SEND panel for more funding. The view put forward is that the High Needs Block surplus should be released now to support the financial pressure that schools face. The Business Advisor and the Chair of the Forum responded to these questions and comments with reference to the strategic discussions / agreements that have been had / made in the Forum over the last 2 years regarding the current High Needs Block surplus - the use of small proportion of this surplus (£0.920m) in support of inclusion but then the holding of this as part of the mitigation and management of the future forecasted deficit. The Business Advisor highlighted again for members that the High Needs Block is forecasted to overspend by £14m in 2024/25 and by £22m in 2025/26, and on this basis, the High Needs Block would be cumulatively in deficit at the end of 2025/26. Members were reminded that a working sub-group of the Forum is about to be convened to continue discussions on these matters and on mitigation. One of the elements of mitigation is exercising restraint in the way our Banded Model incrementally annually increases in the lead to the expected introduction of a national Banded Model following the national SEND review. The Business Advisor clarified that the element 2 £6,000 is a fixed national figure, which the Authority cannot adjust from. In response to these explanations, the member representing maintained primary schools added that the Authority has recently lost out on a free school bid because of our High Needs Block surplus position and reiterated their view that the surplus should be spent now. The Business Advisor responded to explain that this comment is made with reference to the DfE setting a key criteria for a successful free school bid being that an authority's High Needs Block must be in deficit. There are a mixture of ways to respond to this. The member clarified that they do not advocate going into deficit but that the surplus should be spent.

- The Strategic Director commented that the Forum has been very successful in taking decisions from a medium to longer term point of view. She added that high needs funding is under a national spotlight at the moment and is coming under increasing scrutiny because of the problems that parents, schools and local authorities face. It is understood by the Authority that all parts of the system, including schools, are under pressure.
- The member representing academy special schools explained that the District Achievement Partnership (DAP) is very aware of the District wide complexities and significant challenges. The current situation, whilst very challenging, may provide opportunities for positive change and greater collaboration between sectors, and between the DAP and mainstream schools, which would be a very positive step.

**Resolved – That the Consultation - High Needs Block Formulae Funding 2024/25 be published.**

## **722. EARLY YEARS BLOCK FUNDING MATTERS 2024/25**

The Business Advisor (Schools) provided a quick update verbally on Early Years Block funding matters. He explained that no further announcements, since the 13 September Forum meeting, have been made by the DfE regarding the 2024/25 Early Years Block settlement or Early Years Single Funding Formula (EYSFF) arrangements. The Authority has been modelling behind the scenes and the Early Years Working Group (EYWG) is convened for 19 October. Members that are interested in attending the EYWG are welcome and should email the Business Advisor.

**Resolved – That the information presented be noted.**

## **723. DSG CENTRAL ITEMS AND DE-DELEGATED FUNDS 2024/25**

The Business Advisor (Schools) presented a report, Document QL, which asked the Schools Forum to review the position of Central Schools Services Block, Schools Block and Early Years Block central funds and de-delegated items for the 2024/25 financial year. In his presentation, the Business Advisor highlighted that:

- The Central Schools Services Block faces increased pressure, which must be considered as part of the 2024/25 decision making round.
- A report will be presented to the next meeting in December, which will ask the Forum to consider a request from the Local Authority to increase the funding of centrally managed support services within the Early Years Block in response to the extension of the early years entitlements.
- Further information will be presented to the next meeting in December on the use and impact of the de-delegated school improvement monies that have been held for the 2022/23 academic year.
- Subject to confirmation on levels of buy in for 2023/24, because buy in to the Authority's collective Trade Union Facilities Time arrangements remains very strong, it is anticipated that the cost per pupil contribution for schools can be reduced in 2024/25 (by an estimated 5%). This will be confirmed at the next meeting in December.
- The Authority has concluded that, due to the continued conversion of maintained primary schools to academy status, there will not be sufficient 'critical mass' to continue to deliver an effective and efficient maternity / paternity insurance scheme. As such, to give primary schools time to plan, the Authority signals now that this scheme is expected to cease at the end of the 2024/25 academic year.
- Members representing maintained primary schools are asked to take a decision on whether de-delegation for the purposes of subscribing to Fischer Family Trust software continues in the 2024/25 financial year. The Authority's recommendation is that de-delegation now ceases. The 2 voting members that were present at the meeting both agreed this recommendation.

Members did not have any questions and did not make any comments on the report.

**Resolved –**

- (1) That the information presented in Document QL be noted.**
- (2) Schools Forum Members did not request at this time the further review of any of the centrally managed funds presented in Document QL.**
- (3) Members representing Maintained Primary Schools decided to cease to de-delegate in 2024/25 for the purposes of purchasing subscriptions to Fischer Family Trust.**

**724. SCHOOLS FORUM STANDING ITEMS**

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

**725. AOB / FUTURE AGENDA ITEMS**

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

**726. DATE OF NEXT MEETING**

The next scheduled is Wednesday 6 December. This meeting will be held remotely.

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

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



Our ref: Schools Forum 18.10.23

The Rt Hon Gillian Keegan MP,  
Secretary of State for Education  
Sanctuary Buildings  
20 Great Smith Street  
Westminster  
London  
SW1P 3BT

**Bradford Schools Forum  
School Funding Team**  
6th Floor Britannia House, Hall Ings  
Bradford, BD1 1HX

**Telephone** 01274 432678  
**Fax** 01274 435054  
**Website:** [www.bradford.gov.uk](http://www.bradford.gov.uk)  
**Email:** [andrew.redding@bradford.gov.uk](mailto:andrew.redding@bradford.gov.uk)

18 October 2023

Dear Secretary of State,

### **SCHOOLS BLOCK AND NATIONAL FUNDING FORMULA 2024/25 REVISION**

I am writing as the Chair of Bradford Schools Forum to express our Forum's extreme disappointment and dissatisfaction with the Department's revision of the 2024/25 Schools Block and National Funding Formula settlement for 2024/25, which was published on 6 October. A significant amount of working hours has been spent on preparing detailed documentation to inform school / academy leaders and other providers to support the critical decision-making process from the start of September. Our Schools Forum met for the second time of this academic year, on 11 October, and I am writing on behalf of its members to ask for a response on the following points:

- We understand (from the webinar that was held on 12 October for local authority officers) that the Department knew about the error in September and that it has taken "a month" to publish the revision. On this basis, we conclude that the Department identified this error at least by or at the beginning of September. The Department must be well aware that September is a key month, when local authorities move on formula funding modelling, discussions with their Schools Forums and wider consultation. We suggest that the Department must be very well aware that the notification of a revision at the beginning of October will cause difficulties and additional work for local authorities, Forums, schools, academies and other providers that an alert in September (an alert - not necessarily providing all the revised information, which we accept would take time to produce) would have avoided. Why did the Department not take steps to alert local authorities to this error sooner than 6 October?
- As a result of the revised settlement, Bradford's estimated (based on our estimate of October 2023 pupil numbers) Schools Block funding in 2024/25 is reduced by £4.583m on the 19 July announced settlement. In per pupil terms, we estimate that our Schools Block settlement, now reduced from the 2.44% announced to Parliament through the 19 July 2023 settlement, results in a 1.55% increase on 2023/24. There are already far-reaching consequences to this including but not limited to ten more schools and academies in Bradford being placed on the Minimum Funding Guarantee at 0.5%. Therefore, the revision, is very much **not** impact neutral on our schools and academies; it represents a significantly lower per pupil settlement. Our Schools Forum is now concerned about the material impact of this settlement on school budgets next year, in the light of continued high levels of inflation and pay awards. Please can you provide a copy of the Department's assessment of the sufficiency of the revised 2024/25 Schools Block and



National Funding Formula settlement and the impact that this settlement is expected to have on school budgets?

- We understand that the revision of the National Funding Formula has been necessary to absorb additional cost relating to missed pupil numbers. Although the Department has announced that the quantum has not changed, the per pupil amount will change adversely. This creates additional cost pressures for schools, academies and providers in meeting the needs of all learners. Why has this not been managed by the Department without revising the National Funding Formula allocations for all local authorities, schools, academies and providers? What approaches has the Department made to the Treasury for the allocation of additional funding to ensure the 19 July settlement is maintained for the benefit of children and young people? What other alternatives has the Department considered (and rejected) for identifying funding to avoid having to make this correction?
- Please can you explain what specific new procedures and checks have been put in place by the Department to ensure that such substantial errors in the National Funding Formula calculations are not made in the future?

I look forward to receiving your response.

Yours sincerely,



Ian Morrel  
Headteacher, Titus Salt School  
Chair of Bradford Schools Forum

cc.

Judith Cummins MP	<a href="mailto:judith.cummins.mp@parliament.uk">judith.cummins.mp@parliament.uk</a>
Philip Davies MP	<a href="mailto:daviesp@parliament.uk">daviesp@parliament.uk</a>
Imran Hussain MP	<a href="mailto:imran.hussain.mp@parliament.uk">imran.hussain.mp@parliament.uk</a>
Robbie Moore MP	<a href="mailto:robbie.moore.mp@parliament.uk">robbie.moore.mp@parliament.uk</a>
Naz Shah MP	<a href="mailto:naz.shah.mp@parliament.uk">naz.shah.mp@parliament.uk</a>



## **Matters Arising – Various**

The following short updates are presented in order to keep Forum members informed of important matters that are not picked up within other reports.

### Chancellor's Autumn Statement

- The Autumn Statement that was presented to Parliament on 22 November did not announce any new additional revenue Dedicated Schools Grant (DSG) funding. On this basis, we do not expect additional sums to be included within the 2024/25 DSG Schools Block and High Needs Block settlements, when these are confirmed later in December.

### Early Years Teacher Pay Grant

- On 16 November, the DfE announced details of an additional one-off Teacher Pay Grant allocation for early years (3&4-year-old entitlement delivery), following the September 2023 teachers' pay award. Bradford has been allocated £243,503 for the period September 2023 to March 2024.
- We intend to allocate this Grant to all 3&4-year-old entitlement providers as a one-off lump sum, based on actual recorded delivery across the autumn and spring terms. This will be a pro-rata calculation. A small value of this Grant is additionally allocated to Maintained Nursery Schools (MNS), which we will allocate to MNS based on January 2024 Census numbers alongside the equivalent element of the Early Years Supplementary Grant. All allocations will be paid in March 2024 (at the point spring term delivery is confirmed).

### Support Staff / Officers' Pay Award April 2023

- The National Employers announced their pay offer for support staff / officers (the NJC pay scales award) for April 2023 back in February. The Employers' offer is similar to the final pay award that was agreed for April 2022: £1,925 on all scale points (up to scale point 43 of the NJC scale), with a 3.88% uplift on all points above the NJC scale (point 43). This equates to a range of uplifts, between 9.42% at the bottom of the scale up to 3.88% at the top of (and above) the scale.
- This NJC award was agreed on 1 November.

### Employer's Contribution to Teacher Pensions Review April 2024

- The indication is that the employer's contribution to teacher pensions will increase at April 2024 from 23.6% to 28.6%.
- The indication is that this increase will be financial supported (probably via a Teacher Pensions Grant, as was the case at the last review at September 2019). The Autumn Statement did confirm that the Treasury will provide additional funding to support this.

### DfE Wraparound Childcare Programme - Update

- The DfE published at the end of October guidance for local authorities on the development of the national wraparound childcare programme. The Government's aim is for all parents of primary school children who need it to be able to access childcare in their local area from 8am to 6pm. Parents should expect to see an expansion in the availability of wraparound care from September 2024, with every parent who needs it able to access term-time wrap-around childcare by September 2026. Parents will still be expected to pay to access this provision (the DfE's programme aims to increase the availability of childcare, rather than subsidise the cost of it).

- This programme (and the additional funding allocated by DfE to support it) will be delivered through local authorities. Local authorities are expected to work with primary schools and PVI early years providers, including childminders, to introduce or expand wraparound childcare provision in their area, to “test flexible ways of providing childcare and to gather evidence of what works”.

#### Additional Schools in Financial Difficulty Monies – Maintained Schools

- Alongside the publication in July of the teacher pay award for September 2023, the DfE announced that there would be a national £40m ‘schools in exceptional financial difficulty’ fund to support schools and academies that face exceptional budget pressures in meeting the cost of the award. The DfE announced mid-October the details of how the £40m is allocated. £20m has been allocated to the ESFA to support academies via the existing exceptional financial circumstances requests route. £20m has been allocated to local authorities directly for support for maintained schools.
- Regarding the £20m allocated to local authorities for maintained schools, this has been allocated across only 35 authorities on a pro-rata basis where the DfE has calculated that the value of the deficits that are held by their maintained schools is greater than 1% of funding. Because the DfE has used prior year outturn data (we believe 2022/23 data) and because we had a maintained secondary school that held a deficit of a significant value in our 2022/23 outturn, before the conversion of this school to academy status, Bradford has been allocated £0.934m from the £20m.
- The DfE has given local authorities a good deal of flexibility in how this funding is used, but its purpose is to support maintained schools in deficit. This does not simply have to support the consequences of the September 2023 teachers’ pay award. Authorities are permitted to take account of the wider financial positions of schools and other factors that may cause budget pressure. Authorities are required to be ‘transparent’ in how their monies are used. The DfE cites reporting to the Schools Forum as part of this transparency.
- This £0.934m will be classed as DSG income. We have clarified with the ESFA directly that we are permitted to carry over any unspent funds into 2024/25 in order to continue to support maintained schools in financial difficulty next year. Where we have unspent funds, it is likely that these will be added to the balance of de-delegated funds within the Schools Block and carried forward as a ring-fenced sum into 2024/25.
- The Authority is currently considering how a proportion of this funding can be allocated to support maintained schools in deficit in 2023/24, with the intention that some of this funding is allocated before March 2024 to reduce or eliminate the values of these deficits, where it is appropriate to do so, but that a good proportion will be carried forward to be used in 2024/25. Members will identify and understand that there are pros and cons related to the allocation of such additional funding to a small number of maintained schools and that the Authority will wish to tread carefully.
- The Authority expects to report to the Schools Forum at the March 2024 meeting on the allocation of funding during 2023/24.

## SCHOOLS FORUM AGENDA ITEM

For Action



For Information



**Brief Description of Item**

Forum members are asked to agree newly proposed allocations, from the 2023/24 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 2023/24 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 2023.

**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 2023/24 were agreed by Forum members following the consultation held in October - November 2022, and were part of our final Schools Block APT (pro-forma) submitted to the ESFA in January 2023.

**Primary Phase Growth Fund Allocations Criteria 2023/24**

The criteria and mechanisms agreed for allocating growth funding to primary schools and to primary academies in 2023/24 are the same as used in 2022/23 and are, in summary:

- Where a school / academy is expanding or is admitting a bulge class for the first time in September 2023, the school / academy is allocated 80% of the value of the 2023/24 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 2023/24

The criteria and mechanisms agreed for allocating growth funding to secondary schools and to secondary academies in 2023/24 are the same as used in 2022/23 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 2023, 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 2023 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 2023, 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 2022 Census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers incorporating the school's October 2023 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 2023 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 2023/24 year will be checked against actual October 2023 Census numbers before being confirmed.

**This report asks Forum members to consider allocations from the 2023/24 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) ESTIMATED +30 pupils at Oct 2023, resulting in an allocation of **£67,001** for the period Sept 2023 – March 2024 (total of £114,858 for the 2023/24 academic year). \*
- **Bingley Grammar School** (bulge class intake) +30 pupils at Oct 2023, resulting in an allocation of **£75,514** for the period Sept 2023 – March 2024 (maintained school).
- **Bradford Girls Grammar School** (existing expansion) +29 pupils at Oct 2023, resulting in an allocation of **£72,997** for the period Sept 2023 – March 2024 (total of £125,138 for the 2023/24 AY).
- **Carlton Bolling College** (bulge class intake) +33 pupils at Oct 2023, resulting in an allocation of **£73,701** for the period Sept 2023 – March 2024 (total of £126,344 for the 2023/24 AY).
- **Carlton Keighley** (bulge class intake) +30 pupils at Oct 2023, resulting in an allocation of **£67,001** for the period Sept 2023 – March 2024 (total of £114,858 for the 2023/24 AY).
- **Dixons Allerton Academy** (bulge class intake) +5 pupils at Oct 2023, resulting in an allocation of **£11,167** for the period Sept 2023 – March 2024 (total of £19,143 for the 2023/24 AY).
- **Dixons City Academy** (existing expansion) +20 pupils at Oct 2023, resulting in an allocation of **£50,343** for the period Sept 2023 – March 2024 (total of £86,302 for the 2023/24 academic year).
- **Dixons McMillan Academy** (existing expansion) ESTIMATED +14 pupils at Oct 2023, resulting in an allocation of **£35,240** for the Sept 2023 – March 2024 (total of £60,411 for the 2022/24 academic year). \*
- **Dixons Trinity Academy** (existing expansion) +24 pupils at Oct 2023, resulting in an allocation of **£60,411** for the period Sept 2023 – March 2024 (total of £103,562 for the 2023/24 academic year).
- **Feversham College** (bulge class intake) ESTIMATED +15 pupils at Oct 2023, resulting in an allocation of **£33,500** for the period Sept 2023 – March 2024 (total of £57,429 for the 2023/24 academic year). \*
- **Co-op Academy Grange** (bulge class intake) ESTIMATED +20 pupils at Oct 2023, resulting in an allocation of **£44,667** for the period Sept 23 – March 24 (total of £76,572 for the 2023/24 academic year). \*
- **Ilkley Grammar School** (existing expansion) +25 pupils at Oct 2023, resulting in an allocation of **£62,928** for the period Sept 2023 – March 2024 (total of £107,877 for the 2023/24 academic year).
- **Immanuel College** (existing expansion) +17 pupils at Oct 2023, resulting in an allocation of **£42,791** for the period Sept 2023 – March 2024 (total of £73,357 for the 2023/24 academic year).
- **Oasis Lister Park** (bulge class intake) +20 pupils at Oct 2023, resulting in an allocation of **£44,667** for the period Sept 2023 – March 2024 (total of £76,572 for the 2023/24 AY).
- **Parkside School** (bulge class intake) ESTIMATED +12 pupils at Oct 2023, resulting in an allocation of **£26,800** for the period Sept 2023 – March 2024 (total of £45,943 for the 2023/24 academic year). \*
- **Trinity Academy Bradford** (bulge class intake) ESTIMATED +18 pupils at Oct 2023, resulting in an allocation of **£40,200** for the period Sept 23 – March 24 (total of £68,915 for the 2023/24 academic year). \*

The total value of these 16 allocations is **£808,929**. Please note that 6 of these are currently estimated (as indicated), as the October Census numbers have not yet been released by the ESFA. The updated spending reports to be presented to the Schools Forum on 10 January will confirm these allocations.

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

The Forum set aside from the 2023/24 Schools Block budget the following Growth Fund values to be available to be allocated in support of new growth and adjustments during 2023/24:

- Primary £0
- Secondary £600,000

In addition to the £600,000 taken from the 2023/24 Schools Block, the Forum carried forward from the 2022/23 financial year a figure of £1,319,606 of uncommitted Growth Fund balance. The total cost of the 16 allocations set out above for the Secondary phase is £808,929 and so the Secondary phase Growth Fund provision is estimated to overspend by £208,929. No further allocations to the secondary phase are expected in 2023/24. However, the values of the 6 estimated allocations may adjust. On this basis, in total, the total current estimated value of unspent Growth Fund balance to be carried forward into 2024/25 is £1,110,677. 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 £808,929 from the Growth Fund in 2023/24 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 £1,110,677 of surplus balance of Growth Fund is ring-fenced and is forecasted to be carried forward into 2024/25. \* The Schools Forum will be asked to consider the allocation and / or retention of this balance at the meeting on 10 January.**

\* Please note that 6 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 10 January will confirm these allocations and the total Growth Fund spend and balance to be carried forward.

**List of Supporting Appendices / Papers**

None.

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

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



## SCHOOLS FORUM AGENDA ITEM

For Action

For Information



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

This report provides an update on Early Years Block formula funding matters. We are now working to present a consultation document to the Forum's meeting to be held on 10 January. On this basis, our period of consultation on the 2024/25 EYSFF will need to extend beyond the 10 January (the meeting at which the Schools Forum makes its recommendations on the 2024/25 DSG and formula funding arrangements). As we have done in the last few years therefore, we anticipate presenting to the Forum on 10 January a planned Early Years Block budget for 2024/25, which will be based on assumptions and estimates that are made prior to the completion of our consultation.

**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) and again on 12 July (Document QC). Reports on the DfE's consultation and on the Early Years Supplementary Grant were presented on 13 September (Documents QE and QF).

**Background**

On 15 March 2023, the Chancellor announced that new early 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.
- 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 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. We presented a report to the Forum on 13 September on the allocation of this Early Years Supplementary Grant. On 16 November, the DfE announced a small value of additional grant allocated for the period September 2023 to March 2024 following the teachers' pay award.

The DfE has conducted a consultation, which set out proposals for the approach to the funding of the new and extended entitlements and which gave sight of indicative rates of funding for these entitlements. The deadline for responses to the consultation was 8 September and we submitted a response. A copy of this response was presented to the Forum on 13 September. We explained that this consultation has direct implications for our Early Years Block and local Early Years Single Funding Formula arrangements, from April 2024. We explained that:

- The DfE essentially proposes to extend the local framework that currently exists for the funding of the 3&4-year-old entitlement to the new and extended under 2s and 2-year-old entitlements. This means the establishment of 3 discrete streams of funding / 3 discrete Early Years Funding Formulae within the Early Years Block, that will operate the 5 entitlements separately, but in broadly the same manner using a consistent set of rules (the contain some flexibility), and that will carry different values of per hour funding for providers that will be set according to the values that each authority receives from the DfE's national formula for each of the entitlements.
- Our indicative 2024/25 DfE rate of funding for the combined 2-year-old entitlement is £7.93 per hour.
- Our indicative 2024/25 DfE rate of funding for the new under 2s entitlement is £10.82 per hour.
- The DfE's consultation did not give sight of 3&4-year-old entitlement funding values for 2024/25, with these expected to be confirmed after the November Autumn Statement.

We met with the Early Years Working Group on 19 October to begin to discuss these matters and indicative 2024/25 proposals and modelling.

### **Background (continued)**

One of the key matters that we raised for the Forum's attention on 13 September was that the DfE has indicated that, for the introduction of the under 2s entitlement at September 2024, local authorities will be funded for 22 weeks of delivery for the period September 2024 to March 2025. This will also be the case for the further extension of the entitlements to 30 hours at September 2025 (for the period September 2025 to March 2026). We expressed to the DfE our concern about this approach and its implications for our DSG. Our issue is that we fund our entitlements on a termly basis, using a 12 (summer) / 14 (autumn) / 12 (spring) weeks profile. We generally understand that, other than for slight variation in the number of weeks, many local authorities do the same. This means that we fund 12 weeks in summer, compared with the DfE's Early Years Block DSG-level funding profile of 5/12ths (16 weeks), but we fund 26 weeks in autumn and spring, compared with the DfE's Early Years Block DSG-level funding profile of 7/12ths (22 weeks). Our profile quite closely matches the timing of school holidays. When the new under 2s old entitlement for working parents begins at September 2024, for the period September 2024 to March 2025, we will fund providers for 26 weeks, but will only receive Early Years Block funding for 22 weeks. We have modelled that this will cost us in the region of £1.1m. When the under 2s entitlement is extended to 30 hours at September 2025, and the 2-year-old entitlement is also extended to 30 hours for working parents at September 2025, we also will fund 26 weeks but receive funding for 22 weeks for these for the period September 2025 to March 2026. We have modelled that this will cost us in the region of a further £2.1m. So, in total, across 2024/25 and 2025/26, we estimate that we will have an additional £3.2m of unfunded cost. This is significant and goes beyond 'normal business' in terms of managing fluctuations in numbers, albeit that it is a 'one off cost', which will not be present when the entitlements are fully extended for a full financial year. In terms of mitigation, it does not feel to sense for us to re-profile our way of funding providers in order to manage this short-term situation to remove the cost. For example, this would require us to fund 16 weeks in summer, which is not realistically practical to deliver due to the summer holidays (especially in providers that more generally deliver on a term time only basis) and would require providers to adjust their delivery models. We explained to the Forum that whether or not the DfE responds to our concern on this matter will significantly influence our DSG Early Years Block position and our use of brought forward surplus balances.

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

The Autumn Statement, which was presented on 22 November, did not give any further details of the Early Years Block settlement for the 2024/25 financial year. We have been informed that the DfE will publish on 29 November the outcomes of the consultation, the Early Years Block rates of funding for local authorities for 2024/25 and the operational guidance that authorities must follow in their allocation of funding to providers in support of the delivery of the existing and new entitlements. The DfE is holding a webinar for local authorities on 7 December. Unfortunately, due to the timing of these announcements and the deadlines for reports needing to be ready for the Schools Forum, it has not been possible to write a report for this meeting, which sets out the details and implications of the DfE's announcements. An update will be provided verbally. The Early Years Working Group is scheduled to meet on 14 December. The timeline for turn-around of our responses to these announcements is very short, with the intention that worked up proposals will be presented to the Forum on 10 January and go out for wider consultation with providers following this.

We anticipate being able to provide a verbal update to this meeting on the following crucial matters:

- Our rate of funding for the delivery of the 3&4-year-old entitlement for the 2024/25 financial year.
- Our rate of funding for the delivery of the 'combined' 2-year-old entitlement for the 2024/25 financial year.
- Our rate of funding for the delivery of the new 'under 2s' entitlement for the period September 2024 to March 2025.
- The rules and regulations that authorities must follow regarding the operation of their Early Years Single Funding Formula in 2024/25. This include:
  - Confirmation of whether a deprivation supplement will be optional or mandatory for the funding of the under 2s and 2-year-old entitlements.
  - Confirmation of whether Early Years Inclusion Fund (EYIF), Early Years Pupil Premium (EYPP) and Disability Access Fund (DAF) will be extended to the under 2s and 2-year-old entitlements.
  - The restriction on the retention of funds within the Early Years Block (the '95% rule').
  - Whether the regulations are more prescriptive about how authorities operate EYIF funds.
- Whether we can differentiate in our approach the funding of the 'deprivation' 2-year-old-entitlement from the 'working parents' 2-year-old entitlement.
- Generally, how the DfE will approach funding the Early Years Block for the new and extended entitlements in 2024/25, on a temporary basis, (given that January Census numbers will not be available for the new entitlements until January 2025).
- Specifically, and very crucially, whether the DfE's funding of the Early Years Block covers 26 weeks of delivery cost for the under 2s entitlement, or whether the DfE will still only fund 22 weeks (7/12ths) of delivery. For our DSG planning / modelling, which is presented under other agenda items to this meeting, we have assumed that we will receive funding only for 22 weeks.
- The value of the Maintained Nursery School Supplement, which is used to support the funding of the delivery of the 3&4-year-old entitlement in our maintained nursery schools.

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

Alongside responding to the DfE's announcements, our proposals for the 2024/25 financial year must pick up the following 'local' matters, which we have already flagged with the Early Years Working Group:

- The latest benchmarking of funding rates for providers. The 2023/24 Early Years Pro-forma detail has still to be published, but early benchmarking of the Section 251 Budget information suggests that our 3&4-Year-Old Universal Base Rate value has dropped against national and other median averages. We suspect (access to the Early Years Pro-forma detail will confirm this or otherwise) that this is because the majority of other local authorities, unlike Bradford, did not put in place a new supplement for the continuation allocation of the former Teacher Pensions Grant monies to classes in primary schools and academies in 2023/24. We suspect that the majority of local authorities simply added these grant funds into their Universal Base Rates for all providers, in support of wider funding pressures. This is something that we wish to specifically review for 2024/25, especially in the context of the feedback from the Early Years Working Group that the value of the Universal Base Rate for the 3&4-year-old entitlement is the most crucial aspect of the Early Years Single Funding Formula.
- We have set out (in consultations in recent years) the intention to reduce our spending on the Deprivation & SEND Supplement within our 3&4-year-old Early Years Single Funding Formula down to the average of our statistical neighbours, with a third step to be taken in 2024/25. Our modelling currently works on the basis that we will reduce the spending on this Supplement in 2024/25 to 5.5% of 3&4-year-old entitlement funds. Whilst the final position needs to be informed by the Early Years Block settlement and by the latest benchmarking information, we do expect to reduce Supplement spending to 5.5%.
- Given the pressures on the Early Years Inclusion Fund, the significant increase in the number of EYIF claims, and feedback from providers on EYIF processes, the Authority is currently looking at ways in which access to EYIF funding can be improved. We anticipate setting out proposals for consultation, which we will present to the Schools Forum on 10 January. These proposals may include a move to pilot a new EYIF approach in 2024/25 before deciding on more widescale changes in future years. In pulling together an approach, it is important to highlight that EYIF funding must be paid for (from the Early Years Block) and therefore, a substantial increase in EYIF funds must result in a reduction of funding that is allocated elsewhere, including a reduction in the values of the Universal Base Rates that providers receive for the delivery of the entitlements. We are very conscious therefore, that an appropriate balance must be achieved.
- In recent years, we have uplifted the value of Disability Access Fund (DAF) allocations that we pass through to providers, above the minimum value that the DfE funds. In the context of the likely extension of DAF to all entitlements, and the financial pressures that are present within the Early Years Block, we will need to review this position for 2024/25.
- We will need to pick up how the maintained nursery school elements of the Early Years Supplementary Grant and Early Years Teacher Pay Grant (both allocated as separate grants for the period September 2023 to March 2024 but continued within the 2024/25 funding settlement) are consolidated without our maintained nursery school sustainability lump sum arrangements.

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

We will set out in detail the implications for the DSG on 10 January, when we expect to present the Authority's consultation and the full 2024/25 proposed DSG planned budget.

### **Recommendations**

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

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

None

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

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

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## SCHOOLS FORUM AGENDA ITEM

For Action

For Information



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

**This report asks Forum members to consider the feedback received to the consultation on our 2024/25 Schools Block formula funding arrangements and Schools Block centrally managed funds.**

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

The consultation document and modelling was presented to the Schools Forum meeting 11 October 2023.

**Background / Context**

The consultation document outlined the Authority's proposals against the key decisions that are required to set Bradford's 2024/25 financial year mainstream primary and secondary funding formula arrangements. These decisions are:

1. Whether we transfer budget from Schools Block to the High Needs Block and, if we do, the value of this transfer.
2. Whether we continue to fully mirror the DfE's National Funding Formula (NFF).
3. The value (% level) of the Minimum Funding Guarantee, which can be set between 0% and positive 0.5%.
4. Whether we continue our existing local approaches to the factors that are still not covered by the National Funding Formula.
5. Whether we again incrementally adjust our definition of Notional SEND Budgets in the movement towards the 'hard' NFF.
6. How we would amend our mainstream primary and secondary funding formula, if necessary for affordability reasons, should the total cost of our formula substantially increase (and be unaffordable) when the October 2023 Census dataset is used.
7. Whether we retain, with their existing criteria and methodologies, the funds currently managed centrally within the Schools Block (de-delegated funds, Growth Fund and Falling Rolls Fund). The consultation document set out proposals for the continuation of de-delegated and other centrally managed funds. These funds are discussed in more detail in Document QU. However, responses to the consultation are presented here.

**Details of the Item for Consideration**

Consultation & Responses

The consultation ran between 11 October and 28 November. Responses could be submitted electronically via a web-based survey.

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

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

The Authority received one formal responses submitted using the web-based survey. To the questions for which a response was provided, the respondent either 'strongly agreed' or 'agreed on balance' in the majority, but 'strongly disagreed' with question 7 (Falling Rolls Fund).

In presenting to various groups, the Authority did not receive any negative or other significant comments expressed in real time about the proposals.

**Forum members are asked to consider whether any of the proposals should be amended in the light of feedback and / or whether further information is required in order for the Schools Forum to make its recommendations, on 10 January 2023, on the primary & secondary mainstream formula for 2024/25.**

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

As set out in Document QR (DSG update).

**Recommendations**

- (1) The Forum is asked to consider the responses received to the consultation and whether any of the proposals on the 2024/25 primary and secondary mainstream funding formulae, or Schools Block centrally funds and criteria, should be changed in the light of these responses.
- (2) Members are asked to note that they will be asked to make final recommendations on the Schools Block formulae, and the criteria for the allocation of Schools Block central funds, on 10 January. As such, Members are asked to consider whether sufficient information has now been provided to enable these recommendations to be made.

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

None

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

Andrew Redding, Business Advisor (Schools)

01274 432678

[andrew.redding@bradford.gov.uk](mailto:andrew.redding@bradford.gov.uk)

## SCHOOLS FORUM AGENDA ITEM

For Action

For Information

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

This report provides Forum members with updated indicative modelling of mainstream Primary & Secondary formula funding delegated budget shares for 2024/25, using the pupil numbers taken from the October 2023 Census. This modelling is tabled only for information at this stage, prior to asking Forum members to make final recommendations on Schools Block funding on 10 January.

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

The consultation on Primary and Secondary formula funding arrangements for 2024/25 was discussed at the last Forum meeting 11 October.

**Background / Context**

The 2024/25 consultation document incorporated modelling:

- Using estimated October 2023 Census pupil numbers.
- Using October 2022 Census based pupil circumstances data i.e. the data (such as Free School Meals, English as an Additional Language, Income Deprivation Affecting Children Index, Low Prior Attainment) that was used to calculate actual 2023/24 allocations.
- Continuing to exactly mirror the DfE's National Funding Formula, as this exists for 2024/25, including the uplifted mandatory per pupil minimums (MFLs).
- Incorporating a positive 0.5% per pupil Minimum Funding Guarantee (MFG).
- On the basis that we continue to use our current methodologies for the factors not yet included in the National Funding Formula.

Under 'Decision 6' in our consultation document, as we did this time last year, we set out the concerns we have that significant changes in pupil circumstances data between October 2023 and October 2022, such as a significant increase in the number of children recorded as eligible for Free School Meals, may affect the affordability of our proposals. We have previously discussed these concerns, and possible approaches to managing these, with the Schools Forum, and we set these out in the consultation document.

We will not have a good view of the overall affordability position until we have access to the full dataset later in December. As such, this is a matter that we will pick up with the Schools Forum on 10 January.

**Details of the Item for Consideration**

The modelling, attached at Appendices 1a, 1b and 1c, provides Forum members with an updated view of primary and secondary mainstream school and academy indicative (estimated) core formula funding and Pupil Premium Grant allocation totals for 2024/25, now using pupil numbers taken from the October 2023 Census where these are available. However, the census data for 41 academies has not yet been released. In these cases, the modelling is still based on the previous estimates of October 2023 Census pupil numbers.

For clarity, these indicative allocations for individual schools and academies have still not been updated for changes in pupil circumstances data (e.g. Ever 6 FSM %, IDACI, EAL, Low Prior Attainment etc.) that will have been recorded in the October 2023 Census. The Census dataset will not be made available by the ESFA until later in December. Updated modelling will be presented to the Schools Forum on 10 January.

The modelling is based on the same assumptions and proposals that were used to construct the modelling, which accompanied the consultation document. These assumptions are listed above. The only difference is the use of October 2023 Census actual pupil numbers, where these are now available.

The factors that may result in variances in formula funding and Pupil Premium Grant allocations for individual schools and academies in 2024/25, not yet built into the modelling we present now, are:

- Final recommendations on the decisions for consideration, as set out in the consultation document e.g. the value of the Minimum Funding Guarantee, whether we need to make adjustments to our mirroring of the NFF to secure an affordable approach.
- Changes in individual setting pupil circumstances data, such as IDACI, FSM, EAL, SEN low prior attainment, as recorded in / based on the October 2023 Census.

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

- Pupil Premium Grant (PPG) allocations, as these allocations will be calculated on Ever 6 FSM numbers taken with reference to the pupils on roll that were recorded in the October 2023 Census. On a like-for-like basis, schools and academies that have recorded growth in their FSM numbers between October 2022 and October 2023 should see increased PPG allocations in 2024/25, alongside increased deprivation funding through the core-funding formula.
- Pupil Premium Grant (PPG) funding rates for 2024/25 are still to be announced; critically whether these rates will increase for pay award and for inflation. This is especially critical where schools and academies allocate PPG to support staffing capacity. Modelling does not increase the rates on 2023/24 values.
- Growth Fund allocations for existing expanding schools and academies, which will be based on final confirmed October 2023 census numbers and the final base £app values within our 2024/25 mainstream funding formula.
- Any allocations that may come from the Falling Rolls Fund.

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

This is an item for information. As introduced above.

### **Recommendations**

#### **Recommended –**

- (1) The Forum is asked to note the Primary and Secondary modelling information. A further update will be provided on 10 January, when Forum Members will be asked to make final recommendations on the values of funding allocated via each formula factor.**
- (2) Members are asked to consider whether sufficient information has been provided to enable final recommendations to be taken on 10 January on the matters presented in this report.**

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

- Appendix 1a - Indicative Variances Analysis 2024/25 - Individual Primary School / Academy Modelling
- Appendix 1b - Indicative Variances Analysis 2024/25 - Individual Secondary School / Academy Modelling
- Appendix 1c - Indicative Variances Analysis 2024/25 - Individual All Through Schools Modelling

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

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



		2023/24 Actuals				2024/25 Estimated - see notes below				Variances				MFG	Core Formula Funding				2023/24
Phase	School	Formula Funding (excluding rates, PFI and Split Sites)		Growth Fund / Safeguarde	Pupil Premium Grant (latest published)	Formula Funding (excluding rates, PFI and Split Sites)		Growth Fund / Safeguarde	ESTIMATED Pupil Premium Grant	Formula Funding (including MFL & MFG)	Growth Fund / Safeguarde Salaries	Pupil Premium Grant	Total Variances	MFG 2024/25 (included in figures to the left)	2023/24 £app	2024/25 £app	£app Variance	Pupil Number Difference	2023/24 Funded No.s (October 2023)
		MSAG Grant	Total 2023/24 Actual			MSAG Grant	Total 2024/25 Estimated												
PRIMARY	Addingham Primary School	850,531	27,868	73,953	14,010	966,362	908,170	66,183	11,145	29,771	-7,770	-2,865	19,136	0	4,599	4,610	11	6	197
RECOUPMENT ACADEMY	All Saints' CE Primary School (Bradford)	3,073,304	102,760	0	359,385	3,535,448	3,226,392	0	359,385	50,329	0	0	50,329	0	5,232	5,307	74	1	608
PRIMARY	All Saints' CE Primary School (Ilkley)	1,546,155	48,263	3,168	30,510	1,628,096	1,572,010	6,650	29,055	-22,408	3,482	-1,455	-20,381	0	4,543	4,610	67	-10	341
RECOUPMENT ACADEMY	Beckfoot Allerton Primary Academy	1,915,821	63,172	0	173,480	2,152,473	1,920,094	0	164,750	-58,898	0	-8,730	-67,628	0	5,100	5,189	89	-18	370
RECOUPMENT ACADEMY	Ashlands Primary School	1,451,217	46,982	0	60,665	1,558,863	1,350,407	0	54,845	-147,791	0	-5,820	-153,611	8,897	4,568	4,641	73	-37	291
RECOUPMENT ACADEMY	Atlas School	988,255	31,283	0	81,480	1,101,018	1,079,910	0	85,845	60,372	0	4,365	64,737	0	5,793	5,837	45	9	185
RECOUPMENT ACADEMY	Baildon CE Primary School	1,819,265	56,370	0	43,515	1,919,150	1,903,930	0	43,515	28,295	0	0	28,295	0	4,541	4,610	69	0	413
PRIMARY	Bankfoot Primary School	1,098,235	34,766	0	70,155	1,203,156	1,134,282	0	70,155	1,282	0	0	1,282	0	5,294	5,350	56	-2	212
RECOUPMENT ACADEMY	Barkerend Primary Leadership Academy	2,637,330	85,703	0	274,615	2,997,647	2,675,371	0	265,885	-47,662	0	-8,730	-56,392	0	5,267	5,351	84	-17	500
PRIMARY	Ben Rhydding Primary School	832,076	28,135	2,048	25,050	887,309	889,730	2,048	27,580	29,519	0	2,530	32,049	0	4,576	4,610	34	5	193
PRIMARY	Blakehill Primary School	1,842,692	59,967	5,500	109,600	2,017,758	1,931,590	5,500	104,205	28,932	0	-5,395	23,537	0	4,563	4,610	47	2	419
RECOUPMENT ACADEMY	Bowling Park Primary School	3,245,182	106,875	0	428,085	3,780,142	3,372,337	0	425,175	20,280	0	-2,910	17,370	0	5,550	5,630	80	-5	599
PRIMARY	Brackenhill Primary School	1,966,024	61,509	0	136,770	2,164,303	2,104,431	0	141,135	76,899	0	4,365	81,264	10,563	5,133	5,145	12	14	409
PRIMARY	Burley & Woodhead CE Primary School	886,981	28,850	0	14,080	929,911	940,440	0	11,550	24,609	0	-2,530	22,079	0	4,556	4,610	54	3	204
RECOUPMENT ACADEMY	Burley Oaks Primary School	1,775,215	54,452	0	27,645	1,857,312	1,807,120	0	26,190	-22,547	0	-1,455	-24,002	0	4,540	4,610	70	-11	392
RECOUPMENT ACADEMY	Byron Primary Academy	3,071,990	99,031	0	300,425	3,471,446	3,241,319	0	303,335	70,298	0	2,910	73,208	0	5,156	5,228	72	5	620
RECOUPMENT ACADEMY	Carrwood Primary School	1,514,392	51,637	0	232,350	1,798,380	1,550,795	0	229,440	-15,235	0	-2,910	-18,145	24,836	6,094	6,130	36	-4	253
RECOUPMENT ACADEMY	Cavendish Primary School	2,138,769	74,380	0	286,925	2,500,074	2,254,495	0	288,380	41,347	0	1,455	42,802	0	5,346	5,419	74	2	416
RECOUPMENT ACADEMY	Christ Church Primary Academy	987,852	36,157	0	157,075	1,181,084	1,048,881	0	158,530	24,871	0	1,455	26,326	0	5,851	5,926	74	2	177
RECOUPMENT ACADEMY	Clayton St John's CE Primary Academy	1,734,280	59,692	0	176,190	1,970,162	1,754,422	0	170,370	-39,550	0	-5,820	-45,370	0	4,928	5,013	84	-14	350
RECOUPMENT ACADEMY	Clayton Village Primary School	1,045,975	32,758	0	58,515	1,137,249	1,097,343	0	59,970	18,610	0	1,455	20,065	36,965	5,262	5,276	14	3	208
RECOUPMENT ACADEMY	Copthorne Primary Academy	2,131,269	66,060	0	162,580	2,359,908	2,228,668	0	162,580	31,340	0	0	31,340	0	5,219	5,294	74	0	421
RECOUPMENT ACADEMY	Cottingley Village Primary School	1,832,480	60,472	0	111,525	2,004,477	1,885,490	0	110,070	-7,462	0	-1,455	-8,917	0	4,550	4,610	60	-7	409
PRIMARY	Crossflatts Primary School	1,885,340	61,796	0	106,420	2,053,556	1,968,479	0	101,360	21,334	0	-5,060	16,274	0	4,549	4,610	61	-1	427
RECOUPMENT ACADEMY	Crossley Hall Primary School	2,988,657	95,536	0	277,905	3,362,098	3,153,220	0	280,815	69,027	0	2,910	71,937	0	5,166	5,238	72	5	602
RECOUPMENT ACADEMY	Cullingworth Village Primary Academy	1,405,195	47,263	0	91,330	1,543,788	1,470,590	0	91,330	18,132	0	0	18,132	0	4,553	4,610	57	0	319
RECOUPMENT ACADEMY	Denholme Primary Academy	923,995	32,800	0	92,650	1,049,445	1,006,233	0	95,560	49,438	0	2,910	52,348	0	5,117	5,160	44	8	195
RECOUPMENT ACADEMY	Dixons Marchbank Academy	2,152,618	64,053	0	135,315	2,351,986	2,202,110	0	133,860	-14,561	0	-1,455	-16,016	143,754	5,290	5,319	29	-5	414
RECOUPMENT FREE SCH	Dixons Music Primary	1,929,509	61,156	0	101,058	2,091,722	2,004,387	0	101,785	13,723	0	728	14,450	53,445	4,740	4,761	21	1	421
RECOUPMENT ACADEMY	East Morton CE Primary Academy	925,050	30,961	0	22,900	978,911	945,050	0	22,900	-10,961	0	0	-10,961	0	4,552	4,610	58	-5	205
PRIMARY	Eastburn Junior and Infant School	914,509	31,109	0	29,100	974,718	973,226	0	29,100	27,608	0	0	27,608	0	4,590	4,634	44	4	210
RECOUPMENT ACADEMY	Eastwood Primary Academy	1,903,062	61,462	0	163,688	2,128,212	2,056,514	0	168,780	91,989	0	5,093	97,082	0	5,197	5,260	62	13	391
PRIMARY	Eldwick Primary School	2,237,740	67,157	0	53,325	2,358,222	2,351,100	0	53,325	46,203	0	0	46,203	0	4,537	4,610	73	2	510
PRIMARY	Fagley Primary School	1,211,503	41,037	0	153,850	1,406,389	1,254,356	0	152,395	1,817	0	-1,455	362	0	5,799	5,889	90	-3	213
PRIMARY	Farfield Primary	2,105,919	74,645	0	311,280	2,491,844	2,195,733	0	308,035	15,169	0	-3,245	11,924	0	5,493	5,573	80	-3	394
RECOUPMENT ACADEMY	Farnham Primary Academy	2,117,868	66,193	0	169,580	2,353,568	2,215,237	0	170,235	31,176	0	728	31,904	0	5,250	5,325	75	0	416
RECOUPMENT ACADEMY	Fearnville Primary Academy	1,885,599	62,466	0	254,625	2,202,690	1,904,033	0	244,440	-44,032	0	-10,185	-54,217	0	5,833	5,932	99	-13	321
RECOUPMENT ACADEMY	Feversham Primary Academy	2,064,102	65,999	0	173,145	2,303,246	2,175,168	0	174,600	45,067	0	1,455	46,522	0	5,195	5,267	71	3	413
PRIMARY	Foxhill Primary School	936,349	32,105	0	50,100	1,018,554	952,667	0	51,175	-15,787	0	1,075	-14,712	2,111	4,612	4,647	35	-5	205
PRIMARY	Frizinghall Primary School	1,821,451	59,827	0	151,320	2,032,598	1,927,285	0	152,775	46,006	0	1,455	47,461	0	5,044	5,112	69	4	377
PRIMARY	Girlington Primary School	1,262,135	70,353	0	222,615	2,455,103	2,249,286	0	221,160	16,798	0	-1,455	15,343	0	5,367	5,446	80	-3	413
RECOUPMENT ACADEMY	Baildon Glen Primary School	898,686	32,039	0	115,640	1,046,365	914,523	0	111,275	-16,202	0	-4,365	-20,567	0	5,675	5,788	113	-6	158
RECOUPMENT ACADEMY	Green Lane Primary School	2,762,326	88,973	0	302,640	3,153,940	2,923,018	0	305,550	71,718	0	2,910	74,628	0	5,410	5,484	74	6	533
RECOUPMENT ACADEMY	Greengates Primary School	1,041,887	36,042	0	100,395	1,178,324	1,045,577	0	96,030	-32,352	0	-4,365	-36,717	0	5,336	5,446	109	-10	192
RECOUPMENT ACADEMY	Grove House Primary School	1,835,422	61,805	0	157,140	2,054,367	1,924,244	0	157,140	27,016	0	0	27,016	0	4,902	4,972	70	0	387
RECOUPMENT ACADEMY	Harden Primary Academy	911,407	31,525	0	38,145	981,077	981,930	0	39,600	38,998	0	1,455	40,453	0	4,577	4,610	33	7	213
RECOUPMENT ACADEMY	Haworth Primary Academy	1,257,493	41,433	0	43,650	1,342,576	1,242,936	0	40,740	-55,990	0	-2,910	-58,900	2,846	4,574	4,621	47	-15	269
RECOUPMENT ACADEMY	Beckfoot Heaton Primary Academy	3,090,509	101,009	0	306,940	3,498,458	3,251,155	0	308,395	59,637	0	1,455	61,092	0	5,074	5,144	70	3	632
PRIMARY	Heaton St Barnabas' CE Primary School	1,955,553	62,745	0	129,050	2,147,348	1,945,599	0	117,095	-72,699	0	-11,955	-84,654	115,429	4,863	4,901	37	-18	397
RECOUPMENT ACADEMY	High Crag Primary Leadership Academy	1,752,562	63,612	0	254,180	2,070,355	1,670,271	0	229,445	-145,903	0	-24,735	-170,638	0	5,219	5,336	117	-35	313
PRIMARY	Hill Top CE Primary School	1,012,823	33,873	0	68,700	1,115,397	1,048,174	0	69,775	1,477	0	1,075	2,552	0	4,984	5,064	79	-3	207
RECOUPMENT ACADEMY	Hollingwood Primary Academy	2,055,574	66,491	0	164,750	2,286,815	2,205,090	0	169,115	83,025	0	4,365	87,390	0	5,029	5,093	64	11	433
RECOUPMENT ACADEMY	Holybrook Primary Academy	1,283,076	45,688	0	207,685	1,536,449	1,330,941	0	204,775	2,177	0	-2,910	-733	0	6,013	6,105	93	-3	218
RECOUPMENT ACADEMY	Holycroft Primary Academy	1,640,036	55,242	0	177,510														

		2023/24 Actuals				2024/25 Estimated - see notes below				Variances				MFG	Core Formula Funding				2023/24
Phase	School	Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund / Safeguarded Salaries	Pupil Premium (latest published)	Total 2023/24 Actual	Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund / Safeguarded Salaries	ESTIMATED Pupil Premium Grant	Total 2024/25 Estimated	Formula Funding (including MFL & MFG)	Growth Fund / Safeguarded Salaries	Pupil Premium Grant	Total Variances	MFG 2024/25 (included in figures to the left)	2023/24 £app	2024/25 £app	£app Variance	Pupil Number Difference	Funded No.s (October 2023)
RECOUPMENT ACADEMY	Merlin Top Primary Academy	1,734,690	61,066	0	2,077,201	1,794,012	0	277,080	2,071,092	-1,744	0	-4,365	-6,109	0	5,793	5,882	89	-5	305
RECOUPMENT ACADEMY	Miriam Lord Community Primary School	1,886,330	59,691	0	2,122,410	1,911,811	0	170,570	2,082,381	-34,210	0	-5,820	-40,030	0	5,451	5,541	90	-12	345
PRIMARY	Myrtle Park Primary School	944,282	32,566	0	1,015,014	970,501	0	36,710	1,007,211	-6,347	0	-1,455	-7,802	0	4,586	4,666	80	-5	208
RECOUPMENT ACADEMY	Beckfoot Nessfield Primary Academy	1,298,764	43,141	0	1,421,460	1,290,585	0	75,190	1,365,775	-51,320	0	-4,365	-55,685	0	4,793	4,889	96	-16	264
PRIMARY	Newby Primary School	2,026,066	66,326	0	2,272,812	2,131,838	0	181,875	2,313,713	39,446	0	1,455	40,901	0	5,091	5,162	71	2	413
PRIMARY	Newhall Park Primary School	1,908,404	64,791	0	2,180,816	1,972,038	0	199,650	2,171,688	-1,158	0	-7,970	-9,128	0	5,125	5,203	78	-6	379
RECOUPMENT ACADEMY	Oakworth Primary Academy	1,738,940	55,342	0	1,859,242	1,820,950	0	64,960	1,885,910	26,668	0	0	26,668	0	4,566	4,610	44	2	395
RECOUPMENT ACADEMY	Oldfield Primary School	393,714	11,844	0	424,763	412,154	0	19,205	431,359	6,596	0	0	6,596	45,265	7,799	7,776	-23	1	53
RECOUPMENT ACADEMY	Our Lady & St Brendan's Catholic Primary School	1,087,769	35,491	0	1,123,370	1,128,682	0	110,915	1,239,597	5,422	0	-1,455	3,967	0	5,820	5,909	89	-2	191
RECOUPMENT ACADEMY	Our Lady of Victories Catholic Primary Academy	1,106,296	33,606	0	1,194,028	1,141,506	0	54,125	1,195,631	1,603	0	0	1,603	0	5,352	5,436	84	-3	210
RECOUPMENT ACADEMY	Oxenhope CE Primary Academy	901,126	30,692	0	978,603	916,379	0	45,330	961,709	-15,439	0	-1,455	-16,894	0	4,683	4,773	90	-7	192
RECOUPMENT ACADEMY	The Co-op Academy Parkland	1,131,799	40,127	0	1,344,576	1,140,064	0	166,830	1,306,894	-31,862	0	-5,820	-37,682	320	5,949	6,000	51	-7	190
RECOUPMENT ACADEMY	Parkwood Primary School	1,180,399	36,799	0	1,337,963	1,190,991	0	120,765	1,311,756	-26,207	0	0	-26,207	24,681	6,179	6,015	-164	1	198
PRIMARY	Peel Park Primary School	2,695,857	91,309	0	3,089,806	2,851,722	0	305,550	3,157,272	64,556	0	2,910	67,466	0	5,123	5,194	71	5	549
PRIMARY	Poplars Farm Primary School	1,685,662	55,974	45,939	1,934,151	1,974,425	31,588	162,960	2,168,974	232,789	-14,351	16,385	234,823	0	5,048	5,076	27	44	389
RECOUPMENT ACADEMY	Beckfoot Priestthorpe Primary School	895,325	30,527	0	952,575	925,578	0	50,925	976,503	-274	0	0	-274	9,723	4,925	4,950	25	-1	187
RECOUPMENT ACADEMY	The Co-op Academy Princeville	2,000,919	62,384	0	2,226,263	2,204,890	0	171,690	2,376,580	141,587	0	8,730	150,317	0	5,373	5,431	58	22	406
RECOUPMENT FREE SCH	Rainbow Primary Leadership Academy	1,644,414	51,258	0	1,836,080	2,039,705	0	170,235	2,209,940	344,032	0	29,828	373,860	40,395	5,505	5,454	-52	66	374
RECOUPMENT ACADEMY	Reevy Hill Primary School	1,184,584	42,432	0	1,418,251	1,228,074	0	188,325	1,416,399	1,058	0	-2,910	-1,852	0	5,985	6,080	94	-3	202
PRIMARY	Riddlesden St Mary's CE Primary	1,760,717	59,648	0	1,978,959	1,874,234	0	161,505	2,035,739	53,870	0	2,910	56,780	0	4,947	5,011	65	6	374
PRIMARY	Russell Hall Primary School	979,189	34,884	0	1,107,777	1,031,928	0	91,175	1,123,103	17,856	0	-2,530	15,326	0	4,875	4,937	62	1	209
RECOUPMENT ACADEMY	Ryecroft Primary Academy	1,199,249	39,741	0	1,396,131	1,205,465	0	151,320	1,356,785	-33,526	0	-5,820	-39,346	68,505	6,226	6,278	52	-7	192
PRIMARY	Saltaire Primary School	1,841,290	60,814	0	1,931,934	1,931,590	0	123,100	2,054,690	29,486	0	-5,730	23,756	0	4,550	4,610	60	1	419
PRIMARY	Sandal Primary School and Nursery	1,823,670	58,465	0	1,959,430	1,899,320	0	76,960	1,976,280	17,185	0	-335	16,850	0	4,546	4,610	64	-2	412
PRIMARY	Sandy Lane Primary School	1,487,638	49,758	0	1,663,884	1,549,891	0	128,290	1,678,181	12,495	0	1,803	14,297	0	4,928	5,000	72	-2	310
RECOUPMENT ACADEMY	Shibden Head Primary Academy	1,784,025	59,059	0	1,938,934	1,867,050	0	95,850	1,962,900	23,966	0	0	23,966	0	4,551	4,610	59	0	405
RECOUPMENT ACADEMY	Shipleigh CE Primary Academy	897,155	30,719	0	993,349	931,842	0	65,475	997,317	3,967	0	0	3,967	265	5,155	5,177	22	0	180
RECOUPMENT ACADEMY	Shirley Manor Primary Academy	1,029,269	36,203	0	1,195,997	1,026,518	0	124,705	1,151,223	-38,954	0	-5,820	-44,774	0	5,759	5,832	73	-9	176
PRIMARY	Silsden Primary School	2,623,047	85,209	0	2,863,695	2,798,270	0	150,760	2,949,030	90,015	0	-4,680	85,335	0	4,552	4,610	58	12	607
RECOUPMENT ACADEMY	Southmere Primary Academy	1,900,806	63,402	0	2,230,473	1,847,284	0	245,895	2,093,179	-116,925	0	-20,370	-137,295	0	5,881	5,998	117	-26	308
RECOUPMENT ACADEMY	Dixons Manningham Primary Academy	2,098,377	66,978	0	2,373,420	2,169,891	0	205,155	2,375,046	4,536	0	-2,910	1,626	0	5,427	5,507	80	-5	394
RECOUPMENT ACADEMY	St Anne's Catholic Primary Academy	1,097,879	33,888	0	1,191,423	1,147,849	0	59,655	1,207,504	16,081	0	0	16,081	0	5,364	5,440	76	0	211
RECOUPMENT ACADEMY	St Anthony's Catholic Primary School (Clayton)	1,001,021	32,654	0	1,088,585	1,039,265	0	54,910	1,094,175	5,590	0	0	5,590	0	5,042	5,120	77	-2	203
RECOUPMENT ACADEMY	St Anthony's Catholic Primary School (Shipleigh)	672,155	22,806	0	746,961	638,703	0	46,180	684,883	-56,257	0	-5,820	-62,077	9,207	5,605	5,754	150	-13	111
RECOUPMENT ACADEMY	St Clare's Catholic Primary School	1,135,678	37,053	0	1,283,311	1,153,518	0	106,215	1,259,733	-19,214	0	-4,365	-23,579	0	5,665	5,768	102	-7	200
RECOUPMENT ACADEMY	St Columba's Catholic Primary School	1,740,572	59,093	0	2,010,259	1,865,898	0	214,960	2,080,858	66,234	0	4,365	70,599	0	5,437	5,504	67	8	339
RECOUPMENT ACADEMY	St Cuthbert & the First Martyrs' Catholic Primary	1,068,664	34,082	0	1,167,840	1,094,975	0	63,640	1,158,615	-7,770	0	-1,455	-9,225	0	5,251	5,341	90	-5	205
RECOUPMENT ACADEMY	St Francis' Catholic Primary School	990,483	31,481	0	1,055,004	1,027,730	0	33,040	1,060,770	5,766	0	0	5,766	0	4,866	4,941	75	-2	208
RECOUPMENT ACADEMY	St James Primary Academy	1,411,620	48,517	0	1,647,452	1,543,574	0	196,045	1,739,619	83,438	0	8,730	92,168	0	5,681	5,738	57	12	269
RECOUPMENT ACADEMY	St John The Evangelist Catholic Primary	968,473	32,282	0	1,069,725	997,328	0	67,515	1,064,843	-3,427	0	-1,455	-4,882	0	4,979	5,063	84	-4	197
RECOUPMENT ACADEMY	St John's CE Primary School	1,933,535	64,066	0	2,158,636	1,997,695	0	158,125	2,155,820	94	0	-2,910	-2,816	0	4,920	4,994	74	-6	400
RECOUPMENT ACADEMY	St Joseph's Catholic Primary School (Bingley)	852,647	28,551	0	910,613	881,497	0	29,415	910,912	299	0	0	299	0	4,687	4,765	78	-3	185
RECOUPMENT ACADEMY	St Joseph's Catholic Primary School (Bradford)	1,655,700	54,201	0	1,888,866	1,722,931	0	178,965	1,901,896	13,030	0	0	13,030	0	5,516	5,576	60	-1	309
RECOUPMENT ACADEMY	St Joseph's Catholic Primary, Keighley	1,444,830	48,122	40,922	1,648,394	1,541,502	16,973	117,430	1,675,904	48,550	-23,949	2,910	27,510	0	4,977	5,038	61	6	306
PRIMARY	St Luke's CE Primary School	1,083,181	36,385	0	1,216,671	1,121,072	0	95,650	1,216,722	1,506	0	-1,455	51	0	5,306	5,390	84	-3	208
RECOUPMENT ACADEMY	St Mary's and St Peter's Catholic	1,133,136	37,067	0	1,289,513	1,118,820	0	112,035	1,230,855	-51,384	0	-2,275	-58,659	0	5,822	5,951	129	-13	188
RECOUPMENT ACADEMY	St Matthew's Catholic Primary School	1,078,695	34,378	0	1,200,688	1,148,419	0	89,070	1,237,489	35,346	0	1,455	36,801	0	5,510	5,575	65	4	206
PRIMARY	St Matthew's CE Primary School	1,874,135	61,996	0	2,116,551	2,063,576	0	190,225	2,253,801	127,445	0	9,805	137,250	0	5,205	5,346	141	14	386
RECOUPMENT ACADEMY	St Oswald's CE Primary Academy	2,019,462	64,834	0	2,306,531	2,166,490	0	228,055	2,394,545	82,194	0	5,820	88,014	0	5,573	5,642	69	10	384
PRIMARY	St Paul's CE Primary School	1,011,829	34,438	0	1,124,457	1,047,481	0	76,735	1,124,216	1,214	0	-1,455	-241	0	5,079	5,160	81	-3	203
RECOUPMENT ACADEMY	St Philip's CE Primary Academy	1,059,052	33,559	0	1,168,272	1,138,154	0	78,570	1,216,724	45,543	0	2,910	48,453	0	5,575	5,634	60	6	202
PRIMARY	St Stephen's CE Primary School	2,065,315	69,503	0	2,387,988	2,191,030	0	256,080	2,447,110	56,211	0	2,910	59,121	0	5,418	5,491	73	5	399
RECOUPMENT ACADEMY	St Walburga's Catholic Primary School	950,983	32,016	0	1,024,054	1,000,936	0	41,055	1,041,991	17,937	0	0	17,937	0	4,659	4,721	63	1	212
RECOUPMENT ACADEMY	St William's Catholic Primary School	739,103	24,440	0	839,203	837,422	0	82,935	920,357	73,879	0	7,275	81,154	0	6,				

Phase	School	2023/24 Actuals				2024/25 Estimated - see notes below				Variances				MFG	Core Formula Funding				2023/24 Funded No.s (October 2023)
		Formula Funding (excluding rates, PFI and Split Sites)	MSAG Grant	Growth Fund / Safeguarded Salaries	Pupil Premium Grant (latest published)	Total 2023/24 Actual	Formula Funding (excluding rates, PFI and Split Sites)	MSAG Grant	Growth Fund / Safeguarded Salaries	ESTIMATED Pupil Premium Grant	Total 2024/25 Estimated	Formula Funding (including MFL & MFG)	Growth Fund / Safeguarded Salaries	Pupil Premium Grant	Total Variances	MFG 2024/25 (included in figures to the left)	2023/24 £app	2024/25 £app	

This analysis excludes Early Years, High Needs and Post 16 funding (it shows pre-16 mainstream Schools Block core-NFF based formula funding only).  
 2023/24 Actuals use the figures included in the APT / Section 251 Budget Statements, except for the Pupil Premium Grant, which uses the latest published figures  
 2024/25 Formula funding figures are now calculated on October 2023 Census pupils numbers (where available) but are still calculated otherwise on the October 2022 Census dataset  
 Pupil Premium Grant (PPG): ESTIMATES for 24/25 are still based on current confirmed 23/24 PPG FSM Ever6 data and 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	2023/24 Actuals				2024/25 Estimated - see notes below				Variances				MFG	Core Formula Funding					
		Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund (Apr 23-Aug 23) / MSAG Grant	Pupil Premium Grant (latest published)	Total 2023/24 Actual	Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund (Apr 24-Aug 24) / Safeguarded Salaries	ESTIMATED Pupil Premium Grant	Total 2024/25 Estimated	Formula Funding (including MFL & MFG)	Growth Fund / Safeguarded Salaries	Pupil Premium Grant	Total Variances		MFG 2024/25 (included in figures to the left)	2023/24 £app	2024/25 £app	£app Variance	Pupil Number Difference	2024/25 Funded No.s (October 2023 + new estab)
RECOUPMENT ACADEMY	Beckfoot Academy	7,902,608	278,653	0	263,010	8,444,271	8,316,082	0	263,010	8,579,092	134,821	0	134,821	0	6,011	6,097	86	3	1,364	
RECOUPMENT ACADEMY	Beckfoot Upper Heaton Academy	5,146,303	177,591	0	312,570	5,636,464	5,328,080	0	311,535	5,639,615	4,186	0	3,151	173,183	7,405	7,441	37	-3	716	
RECOUPMENT ACADEMY	Belle Vue Girls' Academy	5,919,974	209,760	0	329,648	6,459,381	5,966,436	0	315,675	6,282,111	-163,298	0	-13,973	0	6,950	7,061	111	-37	845	
SECONDARY	Bingley Grammar School	9,431,112	336,200	0	380,090	10,147,402	10,095,270	0	382,795	10,478,065	327,958	0	330,663	0	6,186	6,266	81	32	1,611	
RECOUPMENT ACADEMY	Buttershaw Business & Enterprise College Academy	9,920,989	364,429	34,782	701,670	11,021,869	10,359,774	0	697,530	11,057,304	74,356	-34,782	-4,140	0	7,045	7,140	95	-9	1,451	
RECOUPMENT ACADEMY	Carlton Bolling College	10,942,729	390,909	0	661,183	11,994,821	11,588,945	52,643	665,840	12,307,428	255,307	52,643	4,658	0	6,957	7,062	105	12	1,641	
RECOUPMENT ACADEMY	Dixons City Academy	5,754,870	202,917	30,245	268,180	6,256,211	6,179,556	35,959	273,355	6,488,870	221,769	5,714	5,175	0	6,590	6,688	97	20	924	
RECOUPMENT FREE SCH	Dixons McMillan Academy	4,152,408	150,902	36,294	224,930	4,564,535	4,464,579	25,171	230,105	4,719,855	161,268	-11,122	5,175	0	6,682	6,785	103	14	658	
RECOUPMENT FREE SCH	Dixons Trinity Academy	4,132,635	147,722	24,196	209,070	4,513,623	4,505,831	43,151	217,350	4,766,332	225,474	18,955	8,280	0	6,709	6,806	97	24	662	
RECOUPMENT ACADEMY	Bradford Forster Academy	7,108,533	256,778	0	515,160	7,880,471	7,267,310	0	500,670	7,767,980	-98,001	0	-14,490	0	7,387	7,508	120	-29	968	
RECOUPMENT ACADEMY	Feversham College	4,056,383	140,539	0	186,703	4,383,624	4,257,066	23,929	188,255	4,469,250	60,145	23,929	1,553	59,834	6,824	6,855	31	6	621	
RECOUPMENT ACADEMY	Co-op Academy Grange	10,545,668	387,315	0	785,450	11,718,432	11,205,994	31,905	794,765	12,032,664	273,012	31,905	9,315	0	7,255	7,353	98	17	1,524	
RECOUPMENT ACADEMY	Hanson School	9,465,015	351,347	0	686,175	10,502,537	10,062,694	0	694,455	10,757,149	246,332	0	8,280	0	7,072	7,167	95	16	1,404	
RECOUPMENT ACADEMY	Ilkley Grammar School	8,966,835	295,666	59,650	120,375	9,442,525	9,556,030	44,949	121,410	9,722,389	293,529	-14,701	1,035	0	5,903	5,995	92	25	1,594	
RECOUPMENT ACADEMY	Immanuel College Academy	8,990,111	320,140	103,961	409,570	9,823,781	9,558,520	30,565	414,745	10,003,831	248,270	-73,395	5,175	0	6,430	6,525	95	17	1,465	
RECOUPMENT FREE SCH	Dixons Kings Academy	5,392,398	192,427	0	265,995	5,850,821	5,608,320	0	262,890	5,871,210	23,495	0	-3,105	0	6,657	6,757	100	-9	830	
RECOUPMENT ACADEMY	Laisterdyke Leadership Academy	6,322,746	223,882	0	433,148	6,979,775	6,698,274	0	436,770	7,135,044	151,646	0	3,623	0	7,439	7,543	104	8	888	
RECOUPMENT ACADEMY	Beckfoot Oakbank Academy	9,246,838	335,730	0	546,240	10,128,808	9,882,945	0	556,590	10,439,535	300,377	0	10,350	0	6,772	6,858	86	26	1,441	
RECOUPMENT ACADEMY	Oasis Academy Lister Park	5,569,946	199,744	0	367,425	6,137,115	6,002,372	31,905	376,740	6,411,017	232,682	31,905	9,315	0	7,212	7,320	108	20	820	
RECOUPMENT FREE SCH	One In A Million (Free School)	2,747,664	97,442	0	176,985	3,022,091	2,896,694	0	176,985	3,073,679	51,589	0	0	0	7,567	7,684	117	1	377	
RECOUPMENT ACADEMY	Parkside School	6,271,348	225,917	0	290,305	6,787,569	6,659,118	19,143	293,410	6,971,671	161,854	19,143	3,105	0	6,223	6,306	83	12	1,056	
RECOUPMENT ACADEMY	Trinity Academy Bradford	5,666,750	206,461	19,659	313,393	6,206,263	6,103,042	28,715	321,155	6,452,912	229,830	9,055	7,763	0	6,644	6,729	85	23	907	
RECOUPMENT ACADEMY	Dixons Cottingley Academy	5,768,961	208,442	0	342,585	6,319,988	5,916,512	0	335,340	6,251,852	-60,891	0	-7,245	0	6,910	6,994	83	-19	846	
RECOUPMENT ACADEMY	St Bede's & St Joseph's Catholic College	9,271,918	325,697	0	419,405	10,017,020	9,772,733	0	420,440	10,193,173	175,119	0	1,035	0	6,516	6,612	96	5	1,478	
RECOUPMENT ACADEMY	The Holy Family Catholic School	4,927,500	171,738	0	255,510	5,354,747	5,079,661	0	250,335	5,329,996	-19,577	0	-5,175	0	6,995	7,114	120	-15	714	
RECOUPMENT ACADEMY	Beckfoot Thornton Academy	8,634,416	308,972	0	516,350	9,459,738	9,016,996	0	513,245	9,530,241	73,608	0	-3,105	0	6,885	6,985	100	-8	1,291	
SECONDARY	Titus Salt School	7,919,112	282,644	1,024	423,845	8,626,624	8,231,826	1,024	400,390	8,633,240	30,071	0	-23,455	0	6,463	6,559	96	-14	1,255	
RECOUPMENT ACADEMY	Tong Leadership Academy	5,717,244	208,486	0	410,165	6,335,894	5,852,607	0	399,815	6,252,422	-73,122	0	-10,350	0	7,352	7,456	104	-21	785	
RECOUPMENT ACADEMY	Carlton Keighley Academy	4,871,969	165,515	0	248,860	5,286,344	5,417,454	47,858	266,455	5,731,766	379,970	47,858	17,595	62,272	7,125	7,147	22	51	758	
RECOUPMENT FREE SCH	Bronte Girls' Academy	4,296,811	155,505	0	208,553	4,660,868	4,932,377	0	260,820	5,193,197	480,061	0	52,268	0	6,750	6,851	100	60	720	
RECOUPMENT FREE SCH	Eden Boys Leadership Academy	3,617,561	123,988	0	134,550	3,876,099	4,148,150	0	167,670	4,315,820	406,602	0	33,120	0	6,778	6,891	112	50	602	
<b>SECONDARY TOTALS</b>		<b>208,679,352</b>	<b>7,443,456</b>	<b>309,809</b>	<b>11,407,095</b>	<b>227,839,712</b>	<b>220,931,249</b>	<b>416,917</b>	<b>11,510,545</b>	<b>232,858,711</b>	<b>4,808,441</b>	<b>107,108</b>	<b>103,450</b>	<b>5,018,999</b>	<b>295,290</b>	<b>6,767</b>	<b>6,858</b>	<b>91</b>	<b>278</b>	<b>32,216</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).  
 2023/24 Actuals use the figures included in the APT / Section 251 Budget Statements, except for the Pupil Premium Grant, which uses the latest published figures  
 2024/25 Formula funding figures are now calculated on October 2023 Census pupils numbers (where available) but are still calculated otherwise on the October 2022 Census dataset  
 Pupil Premium Grant (PPG): ESTIMATES for 24/25 are still based on current confirmed 23/24 PPG FSM Ever6 data and 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	2023/24 Actuals				2024/25 Estimated - see notes below				Variances				MFG	Core Formula Funding				2024/25	
		Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund (Apr 23-Aug 23) / MSAG Grant	Pupil Premium Grant (latest published)	Total 2023/24 Actual	Formula Funding (excluding rates, PFI and Split Sites)	Growth Fund (Apr 24-Aug 24) / ESTIMATED	Pupil Premium Grant	Total 2024/25 Estimated	Formula Funding (including MFL & MFG)	Growth Fund / Safeguarded Salaries	Pupil Premium Grant	Total Variances	MFG 2024/25 (included in figures to the left)	2023/24 £app	2024/25 £app	£app Variance	Pupil Number Difference	Funded No.s (October 2023)	
RECOUPMENT ACADEMY	Appleton Academy	7,683,259	284,564	12,098	718,120	8,698,041	8,338,109	47,858	728,830	9,114,797	370,285	35,760	10,710	416,755	0	6,520	6,655	134	31	1,253
RECOUPMENT ACADEMY	Bradford Academy	9,868,442	359,048	0	843,775	11,071,265	10,393,930	0	841,255	11,235,185	166,440	0	-2,520	163,920	0	6,607	6,719	112	-1	1,547
RECOUPMENT FREE SCH	Bradford Girls Grammar (Free School)	5,793,906	204,986	36,294	365,810	6,400,996	6,251,757	52,141	373,250	6,677,148	252,865	15,847	7,440	276,152	0	5,887	6,056	169	22	1,041
RECOUPMENT ACADEMY	Dixons Allerton Academy	9,837,121	349,390	0	604,340	10,790,850	10,382,541	7,976	607,445	10,997,962	196,030	7,976	3,105	207,112	0	6,238	6,332	94	8	1,641
<b>ALL THROUGH TOTALS</b>		<b>33,182,729</b>	<b>1,197,988</b>	<b>48,392</b>	<b>2,532,045</b>	<b>36,961,153</b>	<b>35,366,337</b>	<b>107,975</b>	<b>2,550,780</b>	<b>38,025,092</b>	<b>985,620</b>	<b>59,583</b>	<b>18,735</b>	<b>1,063,938</b>	<b>0</b>	<b>6,341</b>	<b>6,471</b>	<b>130</b>	<b>60</b>	<b>5,482</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).  
 2023/24 Actuals use the figures included in the APT / Section 251 Budget Statements, except for the Pupil Premium Grant, which uses the latest published figures  
 2024/25 Formula funding figures are now calculated on October 2023 Census pupils numbers (where available) but are still calculated otherwise on the October 2022 Census dataset  
 Pupil Premium Grant (PPG): ESTIMATES for 24/25 are still based on current confirmed 23/24 PPG FSM Ever6 data and 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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## SCHOOLS FORUM AGENDA ITEM

For Action

For Information

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

This report asks Forum members to consider the feedback received to the consultation on the 2024/25 High Needs Funding models.

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

The consultation document was presented to the Schools Forum meeting 11 October 2023.

**Background / Context**

The consultation document outlined the formula approach that the Authority proposes to use to delegate Dedicated Schools Grant High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2024/25 financial year. In quick summary, we have proposed to:

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

	(1) % Increase in Top Up Only	(2) % Increase in Top Up plus £6,000	(3) % Increase in Top Up plus £10,000
Band 3L	+ 3.6%	+ 1.0%	+ 0.7%
Band 3M	+ 2.5%	+ 1.0%	+ 0.7%
Band 3H	+ 2.0%	+ 1.0%	+ 0.7%
Band 4L	+ 2.1%	+ 1.3%	+ 1.0%
Band 4M	+ 1.9%	+ 1.3%	+ 1.1%
Band 4H	+ 1.7%	+ 1.3%	+ 1.1%
Protected 7	+ 1.7%	+ 1.4%	+ 1.3%

- Uplift the rates of funding allocated via the PRU / Alternative Provision Day Rate Model. Together, with the fixed £10,000 per place, a proposed 1.71% increase in the day rate will result in an overall 1.04% increase in funding per pupil for each occupied place.
- Continue unchanged the setting-led need factors that are applied in the funding of specialist provisions.
- Continue to pass through to special schools, special school academies, PRUs and alternative provision academies, the additional “3.4% place-element” funding that was allocated in 2023/24, as required by the DfE and the 2024/25 DSG Conditions of Grant.
- Continue to allocate the former Teacher Pay Grant and the former Teacher Pension Grant, separately from top up funding, using the method and values we used in 2023/24.
- Slightly amend our definition of Notional SEND budgets for mainstream schools and academies in 2024/25.
- Continue our SEND Funding Floor mechanism in support of Element 2 funding for SEND and EHCPs in mainstream primary and secondary settings.

The Authority presents separately to this Forum meeting, in Document QT, the annual SEND places sufficiency statement. This report was last presented to the Forum in December 2022. The Authority expects to present an annual update of the fuller DSG Management Plan, focusing on the High Needs Block, to the 10 January meeting.

**Details of the Item for Consideration**

Consultation & Responses

The consultation ran between 11 October and 28 November. Responses could be submitted electronically via a web-based survey.

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

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

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

The Authority received two formal responses that was submitted using the web-based survey. One respondent only provided responses to the first two questions, to 'strongly disagree' with the proposals for uplifting the EHCP Banded Model, stating that the values of EHCP top-up funding are not sufficient to cover the increasing costs of staffing and resources. The other respondent agreed 'on balance' with the questions to which a response was provided, but also commenting that the values of EHCP top-up funding are not increasing at the same rate as salaries costs and that Government should be lobbied for more funds.

In presenting to various groups, the Authority did not receive any negative or other significant comments expressed in real time specifically about the proposals themselves. The District Achievement Partnership, whilst understanding that 1% is 'in line' with the mainstream funding settlement, expressed their continuing concern that it will be a challenge to manage budgets following a 1% increase in funding per occupied place, given the on-going rises in costs, especially salaries costs.

**Forum members are asked to consider whether any of the proposals should be amended and / or whether further information is required in order for the Schools Forum to make its recommendations, on 10 January 2024, on the Authority's High Needs Funding Model for 2024/25.**

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

As set out briefly in Document QR (DSG update). More detailed information will be presented on 10 January.

### **Appendices**

None

### **Recommendations**

- (1) The Forum is asked to consider the responses received to the consultation and whether any of the proposals on the 2024/25 high needs funding formulae, should be changed in the light of these responses.**
- (2) Members are asked to note that they will be asked to make final recommendations on High Needs Block formula funding on 10 January. As such, Members are asked to consider whether sufficient information has now been provided to enable these recommendations to be made.**

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

Dawn Haigh, Principal Finance Officer (Schools)  
01274 433775  
[dawn.haigh@bradford.gov.uk](mailto:dawn.haigh@bradford.gov.uk)

## SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

To provide a summary-level forecast of the DSG income / expenditure position that is currently estimated for the 2024/25 financial year.

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

The DSG's position for 2024/25 has begun to be considered within the consultation items presented in the autumn term. However, this is the first indicative DSG summary to be presented.

**Background / Context**

Our DSG allocation for 2024/25 will continue to be split into four blocks (in size order):

- Schools Block – funding mainstream Primary & Secondary school and academy core formula allocations, School Block de-delegated items (maintained schools) and Growth & Falling Rolls Funds. c. £539m
- High Needs Block – funding provision for high needs children with additional needs valued at greater than £6,000 per annum, including Special schools, PRUs / AP and Post 16 students in Further Education Colleges, as well as SEND support services and other alternative provision and placements. c. £122m
- Early Years Block – funding the Early Years Single Funding Formula and centrally managed items relating to early years entitlement provision (the under 2s, 2, 3 and 4 year old entitlements). c. £66m
- Central Schools Services Block – established at April 2018 to fund items previously 'collected' via 'top-slice' within the Schools Block, including pupil admissions, copyright licensing and other local authority statutory duties held in respect of state funded schools and academies. c. £3.6m

Each of the four blocks is calculated on a National Funding Formula (NFF) basis, which includes protection (for losers) and damping (for winners) as the DSG system moves towards the fuller implementation of NFF over time. 2024/25 is the seventh year of implementation of the NFF distribution.

Many aspects of the DSG for 2024/25 have now been confirmed and will not change. However, there are still some significant elements that will be confirmed by Government later in December and some that will only be confirmed during and after 2024/25, including Early Years Block funding and adjustments to the High Needs Block for imports and exports between authorities and for academy conversions.

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

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

The Regulations (subject to confirmation for 2024/25) require a pass through to providers of 95% of each of the funds for the 3 groups of entitlements within the Early Years Block (EYB). This has the effect of limiting the size of centrally managed funds that can be held within the EYB, as well as restricting the value of the EYB that can be transferred to other blocks or that can be used to cross-subsidise the entitlements.

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

A more detailed and more confirmed analysis of the 2024/25 DSG income position, and planned expenditure, will be provided for the Schools Forum on 10 January.

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

Appendix 1 provides a high-level position statement for the 2024/25 DSG, based on current estimates and assuming that the proposals that have been put forward for formula funding arrangements and for centrally managed funds are fully implemented. This statement also makes assumptions about anticipated Early Years Block arrangements, which are discussed further in Document QN.

There are a number of aspects of DSG income and expenditure that are still to be confirmed and the Schools Forum still has to make its final recommendations on formula funding arrangements, in the light of feedback from the consultations. As such, Forum members are asked to view this summary only as an estimate intended to help plan for decisions. The following aspects of the estimated position, shown in Appendix 1, are highlighted:

- **We estimate we will receive £56.59m (+8.4%) more income than we received in 2023/24 (ROW C)**
  - £29.44m (5.9%) within the Schools Block. Of this increase, £17.07m relates to the transfer of the Mainstream Schools Additional Grant (MSAG) into the Schools Block, leaving £12.37m, which is actually new funding. The majority of this growth comes from the increase provided by the NFF-led settlement, rather than by net growth in our number of pupils. Our Schools Block income forecast is based on estimated total October 2023 Census pupil numbers recorded at 89,027, compared against a total of 88,838 recorded at October 2022; a net change of +189. Within this estimated total, primary-phase numbers are estimated to have reduced by 343 and secondary-phase numbers are estimated to have increased by 532 between October 2023 and October 2022. £0.40m of the £12.37m new funding is specifically retrospectively reimbursing the Schools Block for the increase in NNDR cost in 2023/24, which was initially covered by our Schools Block reserves. This sum is expected to be returned to Schools Block reserves. We are also in receipt of c. £0.80m of implicit growth funding, relating to two new academies that are now fully established. This £0.80m reimburses us for our initial year one unfunded cost of growth and is expected to be returned to Schools Block reserves. We do not anticipate receiving any new funding as a result of the DfE's Falling Rolls Fund changes.
  - £5.34m (4.5%) within the High Needs Block. This is new funding (rather than the impact of any transfers). The majority of this growth comes from the increase provided by the NFF-led settlement, through which Bradford is receiving a capped +5.0% per pupil.
  - £21.73m (49.4%) estimated within the Early Years Block. Our Early Years Block income in 2024/25 will substantially increase as a result of the introduction of the new early years entitlements. Funding will also increase following the consolidation of the Early Years Supplementary Grant and Teacher Pay Grant into the Early Years Block from April 2024. The Early Years Block is discussed further in Document QN and a fuller breakdown of Early Years Block income will be presented at the next meeting. This growth in funding, as a cash value, is significantly estimated, including being based on extended entitlement numbers that are used by the DE. Actual cash growth will be affected by the confirmations of our actual entitlement delivery that will be recorded during 2024/25. Our estimate of the Early Years Block includes the full year continuation of the Maintained Nursery School Supplement. The DfE still has to confirm (at the time of writing this report) how the new extended entitlements will be funded at Early Years Block level and whether we will receive 26 weeks or 22 weeks of funding for the new 9-month-old entitlement. Appendix 1 currently assumes that we will only receive funding for 22 weeks.
  - We estimate that there won't be a significant change in the cash value of our Central Schools Services Block (CSSB) allocation in 2024/25. Whilst we will receive from the DfE growth in funding per pupil of 3.0% through the NFF-led settlement, which is new funding (rather than the impact of transfers), this growth will be offset by the DfE's continued reduction in funding relating to historic commitments, with our allocation being further reduced by £0.04m to £0.14m.
- **We anticipate presenting on 10 January proposed planned DSG budgets for the Schools, Central Schools Services and Early Years Blocks, that do broadly balance 'in year' but which then are likely to use a proportion of surplus balances that are forecasted to be carried forward to specific activities. On current estimates however, we anticipate presenting a High Needs Block planned budget for 2024/25, which substantially exceeds the High Needs Block funding allocation, and which will require a significant proportion of surplus balance to absorb and further discussion regarding mitigating action, including action that can be taken during the year. (ROWS I and J).**
- The most substantial uses of carry forward surplus balances that are currently anticipated, are:
  - Supporting the financial position of the High Needs Block in 2024/25, where we currently estimate an overspend of £17.59m. Of the £17.59m, £3.87m relates to new revenue budget for additional locally developed specialist places and £0.98m continues the Authority's inclusion investment plan spending. The DSG Management Plan, which will be presented to the Forum on 10 January, will discuss in more detail the on-going position of the High Needs Block.

### Details of the Item for Consideration

- Continuing to support the costs of the Early Years Single Funding Formula within the Early Years Block. The DfE still has to confirm (at the time of writing this report) how the new extended entitlements will be funded at Early Years Block level and whether we will receive 26 weeks or 22 weeks of funding for the new 9-month-old entitlement. Appendix 1 currently assumes that we will only receive funding for 22 weeks, meaning that we may need to use c. £1.1m of surplus balance in 2024/25 to meet the cost of the additional 4 weeks without reducing rates of funding for providers to offset this. However, this is a matter that we will need to consider more closely and present proposals to the Forum on 10 January. We are concerned that this issue will completely drain all Early Years Block reserves and therefore, we may look to find additional ways to manage this problem. Alongside this issue, given that two new entitlements are being established during 2024/25, there is significant opportunity for movement and difference from forecasts, which the Early Years Block reserve will be expected to support.
  - Supporting achieving a balanced Schools Block planned budget, where the funding formulae we have proposed may not be affordable when the October 2023 dataset is used. Appendix 1 does not yet show this. The allocation of surplus balances may take place in combination with formulae adjustment. This will be further discussed with the Schools Forum on 10 January, once the impact of the October 2023 dataset is known and has been modelled.
  - The retention of the ring-fenced Growth Fund balance held within the Schools Block to help meet the cost of Growth Fund allocations in 2024/25, rather than taking a higher value of new budget from the 2024/25 Schools Block allocation.
  - The retention of the ring-fenced Falling Rolls Fund balance held within the Schools Block to meet the cost of Falling Rolls Fund allocations, rather than taking new budget from the 2024/25 Schools Block allocation.
  - Continuing to use a proportion of the ring-fenced De-Delegated Funds balance held within the Schools Block to help reduce the values of contributions that would otherwise be taken from maintained school budgets in 2024/25.
  - Continuing to use the ring-fenced Disability Access Funds (DAF) balance held within the Early Years Block to support the value of DAF funding per child that is allocated to providers.
  - Continuing to use the balance held within the Central Schools Services Block to appropriately uplift centrally managed budgets and contributions to Council-managed statutory functions that are funded from this Block.
- **We anticipate that there won't be any transfers of DSG income between blocks in 2024/25 (ROW H).**
  - **We forecast that our DSG account will not be in deficit, either at 31 March 2023 or 31 March 2024 (ROWS M AND N). However, our forecast indicates deficit at the close of the 2025/26 financial year.**
  - **We forecast that there will be a net surplus of balances held at 31 March 2024 in centrally managed funds within the Central Schools Services Block, as well as in De-Delegated Funds within the Schools Block, meaning that we do not anticipate that the 2024/25 Schools Budget will be needed to write off any net deficit balances in funds that are carried forward from 2023/24 (ROW F).**
  - **We do not plan to hold 'safety net' provision (completely unallocated contingency) within the 2024/25 planned budget (ROW E).** The absence of safety net provision means that, in 2024/25, any unexpected or higher than expected costs, where these cannot be met by savings elsewhere within that block, will need to be covered by brought forward balances or be carried forward to be dealt with in 2025/26. Our High Needs Block and Early Years Block require close monitoring in this regard. Although our 2025/26 forecast shows an increasingly challenging picture, the total value of balances that are estimated to be carried forward at both March 2024 and March 2025 should ensure that our DSG account remains in surplus at least to the end of the 2024/25 financial year.
  - **We do not plan any addition to the 2024/25 Schools Budget from non-DSG funds (ROW K).**

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

As outlined in this paper.

**Recommendations**

Forum members are asked to consider the information presented in the report, for reference, in advance of making final recommendations on 10 January 2024.

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

Appendix 1 – 2023/24 Indicative DSG Summary.

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

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

**2024/25 Planned Budget (Dedicated Schools Grant (DSG) Income and Expenditure Summary)**

	Schools Block	High Needs Block	Early Years Block	Central Schools Services Block	Total DSG
<b>A) ESTIMATED 2024/25 DSG ALLOCATION</b> (before academy recoupment and other ESFA direct funding reductions)	<b>538,833,993</b>	<b>122,217,571</b>	<b>65,727,641</b>	<b>3,630,947</b>	<b>730,410,153</b>
% of total DSG by Block	73.8%	16.7%	9.0%	0.5%	
<b>B) 2023/24 DSG ALLOCATION</b> (latest) (please note that final 2023/24 Early Years Block allocation will not be confirmed until July 2024)	509,389,606	116,875,377	44,000,936	3,558,643	<b>673,824,562</b>
<b>C) DIFFERENCE IN DSG ALLOCATION A - B</b> (positive = income increase)	<b>29,444,387</b>	<b>5,342,194</b>	<b>21,726,705</b>	<b>72,304</b>	<b>56,585,591</b>
<b>D) TOTAL ESTIMATED PLANNED EXPENDITURE 2024/25 SCHOOLS BUDGET</b>	<b>537,633,994</b>	<b>139,810,075</b>	<b>66,861,598</b>	<b>3,689,785</b>	<b>747,995,452</b>
<b>E) VALUE OF SPENDING SAFETY NET PROVISION WITHIN PLANNED EXPENDITURE ROW D</b>	0	0	0	0	0
<b>F) VALUE OF 2024/25 SCHOOLS BUDGET (ROW D) PROPOSED TO WRITE OFF DEFICIT BALANCE BROUGHT FORWARD FROM 2023/24</b>	0	0	0	0	0
<b>G) TOTAL UNDERSPEND / OVERSPEND ON 2024/25 DSG ALLOCATION A - D</b> (negative = overspend)	<b>1,200,000</b>	<b>-17,592,504</b>	<b>-1,133,957</b>	<b>-58,838</b>	<b>-17,585,299</b>
<b>H) PROPOSED TRANSFER OF DSG INCOME BETWEEN BLOCKS 2024/25</b>	0	0	0	0	0
<b>I) PROPOSED ALLOCATION OF BALANCE BROUGHT FORWARD FROM 2023/24 TO SUPPORT SPECIFIC AGREED ITEMS INCLUDED IN ROW D</b>	0	0	1,133,957	0	<b>1,133,957</b>
<b>J) BALANCE BROUGHT FORWARD FROM 23/24 TO SUPPORT BLOCK OVERSPEND IN 24/25 (POSITIVE) OR UNDER SPEND IN 24/25 TO RETAIN (NEGATIVE)</b>	-1,200,000	17,592,504	0	58,838	<b>16,451,342</b>
<b>K) ADDITIONAL NON-DSG FUNDS ALLOCATED TO SUPPORT DSG SPENDING ACTIVITY</b>	0	0	0	0	0
<b>L) ESTIMATED FINAL OVER OR UNDER SPEND POSITION BY BLOCK IN 2024/25 G + H + I + J + K</b> (negative = overspend)	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>M) ESTIMATED BLOCK BALANCE BROUGHT FORWARD FROM 2023/24</b> (positive = surplus)	3,256,899	23,412,113	3,854,452	178,717	<b>30,702,182</b>
<b>N) ESTIMATED BLOCK BALANCE TO BE CARRIED FORWARD INTO 2025/26 AFTER ROWS I + J</b> (positive = surplus)	<b>4,456,899</b>	<b>5,819,609</b>	<b>2,720,495</b>	<b>119,879</b>	<b>13,116,883</b>
<b>O) ESTIMATED SCHOOLS BLOCK DE-DELEGATED / EARLY YEARS FUNDS BALANCE BROUGHT FORWARD FROM 23/24 WITHIN ROW M</b> (positive = surplus)	625,148		71,709		<b>696,857</b>
<b>P) ESTIMATED SCHOOLS BLOCK GROWTH FUND BALANCE BROUGHT FORWARD FROM 23/24 WITHIN ROW M</b> (positive = surplus)	1,110,677				<b>1,110,677</b>
<b>Q) ESTIMATED SCHOOLS BLOCK FALLING ROLLS FUND BALANCE BROUGHT FORWARD FROM 23/24 WITHIN ROW M</b> (positive = surplus)	500,000				<b>500,000</b>
<b>R) ESTIMATED EARLY YEARS BLOCK DAF (DISABILITY ACCESS FUND) BALANCE BROUGHT FORWARD FROM 23/24 WITHIN ROW M</b> (positive = surplus)			544,715		<b>544,715</b>

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## SCHOOLS FORUM AGENDA ITEM

For Action



For Information



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

**This report updates Forum members on the forecasted spending positions of each of the DSG Blocks in 2023/24. This document gives members a view of the estimated values of balances to be carried forward into 2024/25 and a view of the uses of these balances.**

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

The allocation / retention of balances estimated to be carried forward into 2023/24 was agreed by the Schools Forum as part of its recommendations on the allocation of the DSG that were made on 11 January 2023. Final confirmation of balances brought forward from 2022/23 was presented on 13 September 2023.

**Background / Context**

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

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

Surplus balances brought forward are available to be spent on a one-off basis only. When previously considering such balances, the Forum has sought to avoid allocating these in support of on-going expenditure.

In closing the 2017/18 financial year, we began to 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. However, in the context of the forecasted deficit within the High Needs Block, we now need to more closely consider how reserves can be 'pooled'.

Balances transferred across financial year-end that are associated with de-delegated funds in the Schools and Early Years Blocks are 'ring-fenced' to maintained schools. This is because only maintained schools contribute to these funds. Surplus balances carried forward can be released back to maintained schools through adjustments in the values of the contributions taken for access to de-delegated funds in the next financial year. The DSG Regulations require Forum approval for the writing off of any deficits related to de-delegated funds from the Schools Budget. To date we have not ever asked the Forum to do this.

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

The DfE changed, within the February 2020 Finance Regulations, the provisions that relate to the addition of non-DSG income into the Schools Budget and to the treatment of DSG account deficits. Whilst not immediately relevant to us, as we currently hold a surplus DSG account, it is important for the Forum to be

## **Background / Context**

aware of the 'statutory override' within the Regulations, which is in place to the end of the 2025/26 financial year. This override concerns the treatment of deficit balances, that are held within the DSG, and cumulative deficit DSG accounts. Through the statutory override, cumulative deficit DSG accounts are ring-fenced and are 'set aside' from local authority general fund reserves, meaning that deficits are carried forward to be managed only by using DSG funds in future years and that authorities do not need to make provision for these from their general reserves. The impact of this override not being in place would be that DSG deficits would be added to local authority general fund reserve balances, which would have implications for the wider financial positions of local authorities and for how DSG deficits would need to be managed, using authority general fund reserves alongside / in addition to / rather than DSG funding. We must continue to consider the position of the override (and that it is currently set to cease at the end of the 2025/26 financial year) within our medium term DSG financial planning and especially within our High Needs Block deficit mitigation planning. Bradford's DSG account is not in deficit at the end of 2023/24 and there are no additional contributions from non-DSG income sources into the Schools Budget in 2023/24 or proposed for 2024/25. Through the DSG's Conditions of Grant, the DfE requires local authorities that have an overall cumulative DSG deficit of 1% or more at the end of the financial year to submit a report to the ESFA on how this deficit will be recovered. We have previously reported that the DfE has introduced this challenge in the light of the growing number of local authorities setting deficit DSG accounts, largely due to overspending within their High Needs Blocks. 1% of our DSG is roughly £7m. The DfE also now expects all local authorities to regularly present to their School Forums a DSG Management Plan, which sets out the expected future year DSG position and explains the pressures on spending and mitigating actions that are to be taken, especially with reference to high needs provision. We expect to present a latest update of DSG Management Plan to the Forum on 10 January.

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

### **2023/24 Forecasted DSG Spending Position vs. Planned Budget**

Appendix 1 provides a detailed spending forecast as well as an updated view of the values of balances that are estimated to be held at the end of the 2023/24 financial year. These figures exclude balances held by maintained schools. The table below summarises the estimated positions by block and gives a comparison against the values of balances that were estimated would be held at the end of 2023/24 within the planned budget that was presented to the Schools Forum on 11 January 2023. (£m)

	<b>Schools Block</b>	<b>High Needs Block</b>	<b>Early Years Block</b>	<b>Central Schools Services Block</b>	<b>Total</b>
Estimate of Balances carried from 22/23*	+£5.343	+£25.830	+£4.211	£0.281	+£35.665
Net Value of Balances allocated in 23/24 *	-£1.787	-£4.200	-£0.957	-£0.054	-£6.998
<b>Estimate of Balances to be held at 31/3/24 *</b>	<b>+£3.556</b>	<b>+£21.630</b>	<b>+£3.254</b>	<b>£0.227</b>	<b>+£28.667</b>
Additional Balances carried from 22/23 **	+£0.048	+£0.764	+£0.428	-£0.049	+£1.191
Net Spend Variance on Planned Budget 23/24	-£0.347	+£1.018	+£0.173	£0.000	+£0.844
<b>Revised Estimate of Balances at 31/3/24 ***</b>	<b>+£3.257</b>	<b>+£23.412</b>	<b>+£3.855</b>	<b>+£0.178</b>	<b>+£30.702</b>
<b>Diff Between Original and Current Estimate</b>	<b>-£0.299</b>	<b>+£1.782</b>	<b>+£0.601</b>	<b>-£0.049</b>	<b>+£2.035</b>

\* 2023/24 Planned Budget presented to the Schools Forum on 11 January 2023. Document PQ.

\*\* Confirmation of final balances held 31 March 2023 was presented to the Schools Forum on 13 Sept 2023.

\*\*\* £30.702m is 4.7% of the 2023/24 DSG allocation (£2.035m is 0.30% of the 2023/24 planned budget)

Please note that the £30.702m figure is estimated. In particular, we highlight that the balance to be held in the Early Years Block is calculated on estimates of spring term 2024 EYSFF allocations and the additional cost of Early Years Supplementary Grant allocations, and the High Needs Block balance is based on a series of assumptions about the cost of high needs provision between December and March. An updated estimate will be presented on 10 January. The reconciliation of funds, which takes place as part of the Authority's year-end closedown and which will be presented to the Forum in July 2024, will confirm the final values of balances that have been carried forward at 31 March 2024.

We forecast that the 2023/24 planned budget for the **Schools Block** will be overspent by £0.347m (0.07%):

- - £244,440 estimated net overspend within de-delegated funds, from the deliberate use of balance brought forward to support the cost of the primary phase maternity / paternity insurance scheme, the allocations from the staff suspensions fund and from the exceptional circumstances / schools in financial difficulty fund, and the use of the School Improvement balance.
- - £208,929 estimated overspend from the 2023/24 Growth Fund provision, met deliberately by the Growth Fund reserve. Please see Document QM for more information on Growth Fund spending.
- + £106,217 estimated saving in NNDR (business rates).

### Details of the Item for Consideration

We forecast that the 2023/24 planned budget for the **Early Years Block** will be underspent by £0.173m (0.4%). Including the additional £0.428m of balance brought forward from 2022/23, we estimate that the value of balance to be held at 31 March 2024 within the Early Years Block will be £0.601m greater than the value originally estimated and presented to the Schools Forum on 11 January 2023. It must be stressed that this updated position is still significantly estimated. With this warning, the main reasons for the changes against the original estimates are listed below. It is important to highlight that the overall improvement in surplus balance does mask some significant spending pressures, especially within SEND and the Early Years Inclusion Fund (EYIF), which will affect 2024/25 DSG budget planning:

- The value of balance brought forward from 2022/23 was £0.428m higher than the estimates presented to the Schools Forum on 11 January 2023. In context of the total size of the Early Years Block (£44m) and that, for the planned budget that is presented to the Forum at the beginning of January each year, we are fully estimating the cost of allocations to providers delivering the entitlements in the spring term, prior to the collection of the January Census, this value of variance is not assessed to be materially substantial (and the potential for movement it is a reason that we hold reserve within the Early Years Block).
- We continue to see underspending (estimated at £55,000) in the resources allocated to providers via the Disability Access Fund (DAF). For 3 years now we have increased the value of DAF allocation per child above the DfE's minimum.
- Historically we have been funded at Early Years Block level for a greater number of 3&4-year-old entitlement hours than providers have actually delivered. Due to the way the system works, and our profile of numbers, the net of the loss in summer term vs. the gain in autumn term has historically been to our advantage. This has been one of the contributing factors in our ability to set higher universal base rates at the same time as higher deprivation and SEND supplement rates for providers in our 3&4-year-old Early Years Single Funding Formula. Following the impact of the COVID-19 pandemic, as well as the impact of the reduction in early years numbers from demographic trends, we have been cautious in the assumptions that we have made in the calculation of the planned budgets about the extent to which this 'advantage' is still present. For the 2023/24 planned budget, we assumed that there would be some advantage but that the scale of this would be reduced. We have now collected May 2023 and October 2023 entitlement delivery numbers. Using this data, we estimate that the advantage is still present. The £0.742m estimated underspending in 3&4-year-old entitlement allocations principally is the result of this. In setting the 2023/24 planned budget, we took an equally cautious approach to estimating the cost of funding the delivery of 2-year-old entitlement. Again, we have now collected May 2023 and October 2023 entitlement delivery numbers. Using this data, we estimate that we will underspend this budget by £0.411m. The estimated underspends in the 2-year-old and 3&4-year-old entitlement budgets total £1.153m. These two underspends, however, mask overspends in other elements of the Early Years Block, which it is now important to highlight.
- We currently forecast an overspending of £0.148m in the Early Years Block's contribution to early years SEND activities as a result of pressures on EYIF and SEND. The Authority will propose to adjust (increase) 2024/25 budgets in response, Please see Document QU.
- As we reported to the Forum on 13 September, in our approach to the allocation of the Early Years Supplementary Grant (EYSG) for the period September 2023 to March 2024, and in passing through to providers this Grant at the rates that are set by the DfE, we estimate that we will overspend the EYSG allocation by £0.300m. We stated that we estimate that this overspend will be contained within the boundaries of the original planned budget that was agreed for 2023/24. This overspend is 'one-off' and does not repeat after the 2023/24 financial year.
- We estimate that the cost of Early Years Inclusion Fund (EYIF) allocations will exceed the planned budget by £0.250m. This is due to continuing increase in the number of claims from early years providers. EYIF is a significant source of on-going budget pressure within the Early Years Block, which must be appropriately managed within planned budget decision making going forward. Information on EYIF will be presented to the Forum on 10 January as part of the EYSFF consultation and the 2024/25 DSG planned budget.
- We estimate that the cost of Early Years Pupil Premium (EYPP) allocations will exceed the planned budget by £0.226m. We typically expect to see EYPP costs closely match the discrete EYPP allocation that we receive via the Early Years Block. However, this funding is based on provider DfE census information. Following the transition to the Portal, it has become clear that schools have been under recording EYPP eligible pupils within their DfE census returns. The information, which has been collected via the Portal and which is now used to fund schools, is more accurate. The Authority has responded to this, to improve schools' census reporting processes, but it will take time for the Early Years Block EYPP funding to catch up in 2024/25. However, this overspend should be temporary in nature.

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

We forecast that the 2023/24 planned budget for the **High Needs Block** will be underspent by £1.02m (0.9%). Including the additional £0.764m of balance brought forward from 2022/23, we estimate that the value of balance to be held at 31 March 2024 within the High Needs Block will be £1.782m greater than the value originally estimated and presented to the Schools Forum on 11 January 2023. Members will identify from Appendix 1 that there are a number of movements, both over and under spends, against the planned budget that was presented to the Schools Forum in January 2023. Many of these movements are relatively minor in the context of the size of budgets that are set and are not further discussed.

Forum members are asked to note that the figures in Appendix 1 for the High Needs Block are based on estimates of spending between December 2023 and March 2024. There continues to be a significant amount of structural change, which is taking place on a backdrop of continued significant growth in the numbers of EHCPs and places creation. These changes combine to mean that it is challenging to forecast with certainty what the profile of spend will be for the rest of this financial year. This uncertainty knocks into the setting of the planned budget for 2024/25, where the 2023/24 financial year spending base will be used in certain areas e.g. mainstream EHCPs and Other Local Authority, Non-Maintained Special School and Independent placements, as a starting point to estimate the budget required going forward. Variances in actual vs. estimated spending growth in the period December 2022 to March 2023, have contributed to the movements in spending now reported in Appendix 1 against the 2023/24 budget.

To highlight some specific points from Appendix 1:

- The forecast incorporates £0.980m of additional spending that is based on the Authority's 'inclusion investment support plan', which was presented to the Forum in July 2022.
- The budget provision for additional specialist places creation is estimated to underspend in the short term (this is budget for on-going capacity growth). Places creation is presented in more detail in Document QT (Annual SEND Sufficiency Statement).
- Appendix 1 gives sight of continuing spending pressure in certain areas. The Authority has seen continued significant growth in the number of EHCPs over the last 12 months.
  - We forecast that the cost of mainstream EHCPs, including the cost of the SEND Funding Floor, will exceed the planned budget by £0.984m (spend +36% on 2022/23).
  - We forecast that the cost of independent, out of authority and non-maintained special school placements will exceed the budget by £1.05m (spend +22% on 2022/23). This is a very estimated figure at this time. This budget typically is volatile and can change significantly, depending on high-cost placements.
  - Against this, we currently estimate the cost of placements in Further Education will be £0.708m lower than planned budget. However, again this budget is typically difficult to predict and can change significantly.
  - Due to the significantly increased number of permanent exclusions, we currently estimate that the PRU / AP budget will be exceeded by £0.770m. This is net of the Regulatory adjustments made to formula funding and Pupil Premium Grant allocations follow exclusion.

We forecast a £0.178m surplus balance within the **Central Schools Services Block (CSSB)** at 31 March 2024. This is currently based on estimates of services spending. A reconciliation will take place within the Council's year end closedown process, and we will present to the Forum in July 2024 the final position.

**The 2023/24 planned budget, that was presented to the Forum on 10 January 2023, estimated that we would overspend the 2023/24 DSG allocation by £6.998m in total. We now estimate that we will overspend the 2023/24 DSG allocation by £6.154m. So the planned budget is estimated to underspend by £0.844m, with our total spending still exceeding our DSG in-year income within the parameters that we expected when we set the budget back in January / February 2023.**

### **Allocation and Retention of Balances to be Brought Forward from 2023/24**

Appendix 2:

a) Shows (repeats from Appendix 1) the values of balances that are currently estimated to be carried into 2024/25. It then shows any values that are already committed as a result of previous decisions, and

b) Puts forward indicative proposals / considerations for the allocation and / or retention of the remaining balances. The Forum will be asked to make final recommendations on this on 10 January.

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

An important point to make at the start of considerations is that, due to the forecasted deficit position of the High Needs Block and that currently, estimating that existing spending growth rates will continue in 2024/25 and 2025/26 and prior to further mitigation, we forecast that our DSG account will cumulatively be in deficit at the end of the 2025/26 financial year, one of the mitigating actions that we can take is to assert that general reserves that are held within the DSG at the end of the 2023/24 financial year, where possible, are retained and are 'pooled' to offset / to support the management of the High Needs Block deficit. As we've stated in the introduction of this report, the DSG Regulations permit balances to be used across all the blocks. What we have established up to now is a locally determined informal block ring-fencing policy. Against this, there are certain pressures that we anticipate that we will need to meet in 2024/25, which may require the use of balances, and some balances are ring-fenced for specific purposes. But, the Authority's general position leans towards the retention of balances, where possible, meaning that we would not seek to allocate balances for the purposes of increasing levels of spending in 2024/25 above what they would 'naturally' be.

At this stage, we are not actively deciding on the spending of balances, other than indicating strongly that available balances, where possible and where permitted, would be retained and pooled in support of managing and reducing the size of the cumulative deficit in our DSG account, which is currently forecasted for the end of the 2025/26 financial year.

#### **Schools Block (£3.257m)**

- A ring-fenced balance of £0.625m held in de-delegated funds for maintained schools is estimated to be retained. This balance would be excluded from any pooling of reserves agreed in support of the High Needs Block deficit. A breakdown of this estimated balance by individual fund is provided in the report (Document QU Appendix 2). The Authority proposes to release a proportion (£0.100m) to support the cost of the primary phase maternity / paternity insurance scheme in 2024/25, as was done in 2023/24. The balance will also be used to support, as a priority, staff suspension and exceptional circumstances requests, as well as any costs arising from new deficits held by sponsored primary academy converters. The rest of the balance is ring-fenced and retained. Please note that the value of £0.625m is prior to any addition that comes from the carry-over of the balance of the additional £0.934m 'Schools in Financial Difficulty' DSG funds that the Local Authority has recently been allocated for maintained schools in 2023/24. At this time, pending decisions about how a proportion of these funds are allocated to maintained schools before 31 March 2024, the Authority cannot confirm the value of funds that will be carried forward. However, the intention is that any remaining funds will be added to the balance of the Exceptional Costs and Schools in Financial Difficulty de-delegated fund to be allocated to continue to support maintained schools from April 2024.
- £1.111m of balance relating to the Growth Fund, which is ring-fenced and has been proposed to be retained to support Growth Fund costs on an on-going basis, including to be available to support schools and academies via the flexibilities (for the management of falling rolls and 'surplus places') that are expected to be brought into Schools Block arrangements. This balance could also be used to support a future Schools Block to High Needs Block contribution as part of deficit mitigation activity.
- £0.500m of balance relating to the Falling Rolls Fund (FRF) for the primary phase. We will present a final position statement for 2023/24 to the Forum in March 2024. Based on current modelling, we anticipate that no primary phase schools or academies will be eligible. The £0.500m has been proposed to be retained to support FRF costs in 2024/25, but also to be available to support schools and academies via the flexibilities (for the management of falling rolls) that are expected to be brought into Schools Block arrangements. This balance could also be used to support a future Schools Block to High Needs Block contribution as part of deficit mitigation activity.
- The Appendix 2 balance figure currently assumes that the cost of our Schools Block arrangements in 2024/25 will be £1.200m lower than our 2024/25 DSG Schools Block allocation. This is the position, prior to calculating final formula funding allocations for schools and academies using the October 2023 Census dataset. Members, therefore, should treat this as an estimate at this stage, but this position is shown for planning purposes, on the basis that we would anticipate that £1.200m of 2024/25 Schools Block funding would be returned to Schools Block reserve. £0.400m will reimburse reserves for covering the cost of the increase in NNDR (business rates) within our 2023/24 planned budget and £0.800m will reimburse reserves for the cost in the first year of implicit growth related to two new academies (where in the first year of establishment the reserve covered their 7/12ths formula funding allocations, which were unfunded by the DSG settlement). We will highlight, discuss and confirm proposals for these movements to reserve on 10 January 'in the round' after we have re-calculated the final cost of formula funding. This balance could be used to support deficit mitigation activity.
- On this basis, a balance of £1.021m of reserve carried forward from 2023/24 is estimated to be retained, subject to discussions with the Forum on 10 January regarding the affordability of our formula funding proposals and the other matters that are highlighted above. £1.021m is 0.2% of the Schools Block. This balance could be used to support deficit mitigation activity.

## Details of the Item for Consideration

### Early Years Block (£3.855m)

- A balance of £0.072m in de-delegated funds is estimated to be retained across the financial year-end. This balance is ring-fenced, as it is in the Schools Block. As such, this balance would be excluded from any pooling of reserves that may be agreed in support of the High Needs Block deficit.
- A ring-fenced balance of £0.545m in the Disability Access Fund (DAF) is estimated to be carried forward into 2024/25. We will continue to keep this balance, and action to spend it, under review. Further information in regard to 2024/25 will be set out in the Authority's consultation on Early Years Single Funding Formula arrangements, which is anticipated will be presented to the Forum on 10 January. As DAF is closely related to SEND support, this balance could be included in any pooling of reserves agreed in support of the management of the High Needs Block deficit.
- The DfE still has to confirm (at the time of writing this report) how the new extended entitlements will be funded at Early Years Block level and whether we will receive 26 weeks or 22 weeks of funding for the new 9-month-old entitlement. Appendix 2 currently assumes that we will only receive funding for 22 weeks, meaning that we may need to use up to £1.134m of surplus balance in 2024/25 to meet the cost of the additional 4 weeks without reducing rates of funding for providers to offset this. However, this is a matter that we will need to consider more closely and present proposals to the Forum on 10 January. We are concerned that this issue will completely drain all Early Years Block reserves across 2024/25 and 2025/26 and therefore, we may look to find additional ways to manage this problem. Alternatively, Early Years Block reserves may be available to help support the management of the High Needs Block deficit.
- Subject to confirmations and further discussions on this matter, on current calculations and using available data, we estimate that an unallocated balance of £2.104m (3% of the Early Years Block) would be retained to support the pressures that will need to be managed going forward from April 2025. This may include the 'second stage' of the 26 weeks vs. 22 weeks issue that will be present for the period September 2025 to September 2026 within the Early Years Block. This may also include the pooling of reserves in support of the management of the High Needs Block deficit.

### High Needs Block (£23.412m)

- We currently estimate that we may need to earmark £17.593m of the estimated 31 March 2024 balance to establish a planned budget for the High Needs Block for 2024/25 that balances back to zero. This figure will be updated / confirmed within the information that will be presented to the Forum on 10 January. The £17.593m includes the continuation of £0.980m of inclusion investment spending and £3.869m revenue budget for additional specialist places.
- On this basis, we currently estimate that 75% of the forecasted surplus balance may be deployed during 2024/25 and only £5.819m of balance would remain at 31 March 2025. We currently forecast that the High Needs Block will then overspend in year by £26m in 2025/26, estimating that existing spending growth rates will continue in 2024/25 and 2025/26 and prior to further mitigation.
- The Authority and the Schools Forum have been talking about deficit mitigation since the presentation of the DSG Management Plan on 11 January 2023. The Authority met with a small group of members on 14 November and will continue to meet. We will present to the Forum on 10 January an updated DSG Management Plan, which will include a future year estimate of the High Needs Block and an update on deficit mitigation options and activity.
- In this context, the Authority at this time does not plan any use of the High Needs Block surplus other than to offset the overspending that is forecasted for 2024/25. 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. A first call on the £23.412m will be meeting in year the cost of change, as well as supporting any unexpected costs that may arise across 2023 and 2024 after the planned budget for 2024/25 has been agreed. The second call on the £23.412m balance will be supporting the avoidance of / seeking to reduce the value of cumulative deficit in the High Needs Block.

### Central Schools Services Block (£0.178m)

- On current estimates, £0.058m of surplus balance will be allocated into the 2024/25 planned budget, to continue existing commitments uplifted for pay award and inflation, and to meet the increased cost of copyright licences for mainstream primary and secondary schools and academies, in combination with the 2024/25 CSSB allocation received from the DfE. This leaves an estimated £0.120m, which would be retained.

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

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

**Recommendations**

Members are asked to consider whether sufficient information has been provided to enable final recommendations to be made on 10 January on the allocation and / or retention of estimated DSG balances.

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

Appendix 1 – 2023/24 DSG Spending Forecast Report

Appendix 2 – Statement of uses & retention of balances forecasted to be carried forward into 2024/25

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

Andrew Redding, Business Advisor (Schools)

01274 432678

[andrew.redding@bradford.gov.uk](mailto:andrew.redding@bradford.gov.uk)

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DSG BLOCK and FUND NAME	Confirmed Balance Brought Forward (BFB) from 2022/23	2023/24 Planned Budget (excluding use of BFB)	Planned Use of BFB in 2023/24 (January 2023)	Total of Planned Spending in 2023/24 (January 2023)	Adjustment for academy ESFA direct funding (inc. estimates)	Adjustment to DSG after January 23 (inc. estimates)	2023/24 Revised Planned Budget Spending after DSG adjustments	Total Forecasted Actual Spending up to 31 March 2024	Variance between Actual Forecasted & Revised Budget		Comments
									Estimated Carry Forward Balance at 31 March 2024	Estimated Carry Forward Balance at 31 March 2024	
<b>SCHOOLS BLOCK</b>											
Primary and Secondary mainstream formula funding allocations, including NNDR provision & cost	2,701,976	507,645,286	1,787,119	509,432,405	-395,292,938		114,139,467	114,033,250	106,217	1,021,075	Estimated adjustment to NNDR (Business Rates).
Growth Fund (all new & existing expansions & bulge classes)	1,319,606	796,883	0	796,883	374,337		1,171,221	1,380,150	-208,929	1,110,677	Over-spend planned. Balance is ring-fenced. New allocations presented Document QM. Forum agreed existing growth on 11 January 2023.
Falling Rolls Fund Primary Phase	500,000	0	0	0			0	0	0	500,000	Allocations will be presented to Forum in March 2024. However, we do not anticipate any spend. Balance is ring-fenced.
De-Delegated Funds (see separate breakdown Document QU Appendix 2)	869,588	947,437	0	947,437	-99,159		848,277	1,092,718	-244,440	625,148	Balance ring-fenced. Overspend, from deliberate use of balance for the maternity scheme, SIMB & exceptional circumstances.
<b>Total Schools Block</b>	<b>5,391,170</b>	<b>509,389,606</b>	<b>1,787,119</b>	<b>511,176,725</b>	<b>-395,017,760</b>		<b>116,158,965</b>	<b>116,506,117</b>	<b>-347,152</b>	<b>3,256,899</b>	
<b>CENTRAL SCHOOLS SERVICES BLOCK</b>											
Schools Block Copyright Licences (Schools Block element only)		406,355	0	406,355			406,355	406,355	0	0	Cost was confirmed in December 2022 and was budgeted for on an actuals basis.
Schools Forum cost contribution		11,700	0	11,700			11,700	11,700	0	0	This is a fixed contribution to Schools Forum services, where the total cost of these services exceeds this contribution. No variance.
Pupil Admissions		987,000	0	987,000			987,000	987,000	0	0	Services costs expected to be on budget; final year-end reconciliation will report any variance (presented to Forum in July 24).
Former Education Services Grant Local Authority duties all schools & academies		1,559,300	0	1,559,300			1,559,300	1,559,300	0	0	This is a fixed contribution to the cost of services, where the total cost of these services exceeds this contribution. No variance.
Education Access Officers		500,000	0	500,000			500,000	500,000	0	0	Services costs expected to be on budget; final year-end reconciliation will report any variance (presented to Forum in July 24).
Education Planning and Consultation		148,000	0	148,000			148,000	148,000	0	0	This is a fixed contribution to the cost of services, where the total cost of these services exceeds this contribution. No variance.
CSSB reserve brought forward from 2022/23 / Resilience reserve	232,429	-53,712	53,712	0			0	0	0	178,717	We currently do not anticipate any further spend from reserve in 2023/24. However, TBC to the Forum in July 2024.
<b>Total Central Schools Services Block</b>	<b>232,429</b>	<b>3,558,643</b>	<b>53,712</b>	<b>3,612,355</b>			<b>3,612,355</b>	<b>3,612,355</b>	<b>0</b>	<b>178,717</b>	
<b>EARLY YEARS BLOCK</b>											
3&4 Year Old Early Years Single Funding Formula Allocations & EYB DSG funding 2023/24	3,847,148	33,505,570	837,386	34,342,956		-211,664	34,131,292	33,389,376	741,915	3,751,677	This is the estimated position prior to the confirmation of spring term 2023 costs and EYB funding.
2 Year Old Early Years Single Funding Formula Allocations & EYB DSG funding 2023/24		7,510,346		7,510,346		-1,137,549	6,372,797	5,962,167	410,630	410,630	This is the estimated position prior to the confirmation of spring term 2023 costs and EYB funding.
Early Years Disability Access Fund (DAF)	719,715	0	120,000	120,000			120,000	175,000	-55,000	544,715	Earmarked balance. Planned overspend from use of reserve. Estimated - Final year-end reconciliation will report final variance (July 24).
Early Years Pupil Premium		437,089		437,089		110,431	547,520	773,800	-226,280	-226,280	Forecasted spend above budget (increase in EYPP numbers following Portal). Final year-end reconciliation will report final variance (July 24).
Early Years SEND Inclusion Fund		650,000		650,000			650,000	900,000	-250,000	-250,000	Forecasted overspend due to increased number of claims. Significant spend pressure. Budget for 2024/25 to be reviewed (increased).
Early Years Block access to De-Delegated Funds	71,709	119,330		119,330			119,330	119,330	0	71,709	This balance remains ring-fenced (alongside the de-delegated funds balance within the Schools Block).
Local Authority capacity Early Years Function and EYSFF		530,000		530,000			530,000	530,000	0	0	This is a fixed contribution to the cost of services, where the total cost of these services exceeds this contribution. No variance.
SEND Management (EY PVI Area SENCOS & EY SEND and Portage)		582,000		582,000			582,000	730,000	-148,000	-148,000	Services costs increased on budget; year-end reconciliation will report final variance (presented in July 24).
Copyright Licences (re-charge of Early Years Block element)		36,468		36,468			36,468	36,468	0	0	Cost was confirmed in December 2022 and was budgeted for on an actuals basis.
Estimated Overspend on Early Years Supplementary Grant to Charge to DSG		0		0			0	300,000	-300,000	-300,000	Based on estimated EYSG spending. Comes from the issue of 26 vs. 22 weeks as discussed with the Forum 13 Sept 23.
<b>Total Early Years Block</b>	<b>4,638,572</b>	<b>43,370,802</b>	<b>957,386</b>	<b>44,328,188</b>			<b>43,089,406</b>	<b>42,916,141</b>	<b>173,265</b>	<b>3,854,451</b>	
<b>HIGH NEEDS BLOCK</b>											
Place Plus - Special Schools and Special School Academies		38,182,369	0	38,182,369	-10,373,000		27,809,369	27,523,430	285,938	285,938	Spend estim. at Nov 23; year-end reconciliation will report final variance (in July 24). Inclusive of additional places
Place Plus - Early Years Enhanced Provisions		1,650,000	0	1,650,000			1,650,000	1,845,283	-195,283	-195,283	Spend estim. at Nov 23; year-end reconciliation will report final variance (in July 24). Current places exceeding budget. In review.
Place Plus - Primary & Secondary School-led Resourced Provisions		6,096,565	0	6,096,565	-2,074,667		4,021,898	4,000,552	21,345	21,345	Spend estim. at Nov 23; year-end reconciliation will report final variance (in July 24). Inclusive of additional places
Place Plus - Sensory Primary & Secondary LA-led Resourced Provisions		2,752,459	0	2,752,459	-405,000		2,347,459	2,354,057	-6,598	-6,598	Spend estim. at Nov 23; year-end reconciliation will report final variance (in July 24).
Place Plus - LA-led Resourced Provisions		3,521,674	0	3,521,674			3,521,674	3,413,809	107,865	107,865	Spend estim. at Nov 23; year-end reconciliation will report final variance (in July 24).
Place Plus - PRUs & Alternative Providers		4,066,704	0	4,066,704	-650,000		3,416,704	4,186,908	-770,203	-770,203	Budget funded capacity for 165 places. Additional places commissioned during the year in response to increased need. Offset P-X adjusts.
Place Plus - Post 16 Further Education & SPIs		9,008,000	0	9,008,000	-2,780,000		6,228,000	5,519,864	708,136	708,136	Spend estim. at Nov 24. Budget anticipated a significant increase in the cost of placements in SPIs & growth in post 16 high needs top up numbr
Place Plus - Former Teacher Pay and Pension Grants (allocated in addition to top-up)		1,539,732	0	1,539,732			1,539,732	1,540,202	-470	-470	Small adjustment to actual allocations for confirmed occupied places
Place Plus - Budget Provision for Additional Places		3,408,667	0	3,408,667			3,408,667	40,000	3,368,667	3,368,667	FFE pre-opening spend. Planned Budget built on-going capacity for 180 places (inc. part year). Please see Document QT (SEND Statement).
Place Plus - Additional Place-Led Funding (3.4%) for Special & PRUs / AP as per DfE Conditions		1,392,986	0	1,392,986			1,392,986	1,397,229	-4,243	-4,243	Small adjustment to actual allocations for DfE confirmed base data.
Mainstream EHCPs including SEND Funding Floor, Early Years PVI, Personal Budgets		18,754,000	0	18,754,000			18,754,000	19,738,337	-984,337	-984,337	Spend estim. at Nov 23; year-end reconciliation will report final variance (in July 24).
Independent, Non Maintained Special School & OLA Placements		21,750,000	0	21,750,000			21,750,000	22,800,000	-1,050,000	-1,050,000	Spend estimated at Nov 2023. TBC. This is a volatile budget. Significantly increasing costs (numbers and costs of placements).
Special Schools Inclusion Outreach Support		240,000	0	240,000			240,000	300,000	-60,000	-60,000	Additional spending on the Authority's inclusion investment plan. Addition of £60k for PRUs / AP.
Education in Hospital & Medical Home Tuition Centrally Managed Services		1,583,000	0	1,583,000			1,583,000	1,583,000	0	0	Services spend expected to be around budget; final year-end reconciliation will report any final variance (in July 24).
Speech and Language Therapy Services		328,000	0	328,000			328,000	382,000	-54,000	-54,000	Current estimate; final year-end reconciliation will report any final variance (in July 24).
Specialist Equipment		100,000	0	100,000			100,000	80,000	20,000	20,000	Current estimate; final year-end reconciliation will report any final variance (in July 24).
Copyright Licences (re-charge of High Needs Block element)		78,145	0	78,145			78,145	78,145	0	0	Cost was confirmed in December 2022 and was budgeted for on an actuals basis.
Building Schools for the Future DSG Affordability Gap - Special Schools & Special School Academies		917,000	0	917,000			917,000	917,000	0	0	Spend expected to be on budget; final year-end reconciliation will report any final variance (in July 24).
SEND Teaching Support Services		5,715,000	0	5,715,000			5,715,000	6,075,000	-360,000	-360,000	Inclusive of spending on the Authority's inclusion plan. Year-end reconciliation will report final variance (July 24).
High Needs Block reserve brought forward from 2022/23	26,594,220	-4,199,924	4,199,924	0		-9,000	-9,000	0	-9,000	22,385,296	Small adjustments to DSG income for import / export and places recruitment differences
<b>Total High Needs Block</b>	<b>26,594,220</b>	<b>116,884,377</b>	<b>4,199,924</b>	<b>121,084,301</b>	<b>-16,282,667</b>		<b>104,792,634</b>	<b>103,774,817</b>	<b>1,017,816</b>	<b>23,412,112</b>	
<b>Totals</b>	<b>36,856,391</b>		<b>6,998,140</b>						<b>843,929</b>	<b>30,702,180</b>	

SUMMARY

	Confirmed Balance Brought Forward (BFB) from 2022/23	Variance between Actual Forecasted & Revised Planned Budget Spending (negative = overspend)	Estimated Carry Forward Balance at 31 March 2024 (negative = deficit)
Total Schools Block	5,391,170	-347,152	3,256,899
Total Central Schools Services Block	232,429	0	178,717
Total Early Years Block	4,638,572	173,265	3,854,451
Total High Needs Block	26,594,220	1,017,816	23,412,112
<b>GRAND TOTAL</b>	<b>36,856,391</b>	<b>843,929</b>	<b>30,702,180</b>
<b>CHANGE IN OVERALL VALUE OF DSG SURPLUS MARCH 2024 VS. MARCH 2023</b>			<b>-6,154,211</b>

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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 2022/23 into 2023/24	5,391,171	4,638,572	26,594,220	232,429	36,856,392	As confirmed with the Schools Forum 13 September 2023
<b>Total of Balances (by Block) estimated to be carried forward from 2023/24 into 2024/25</b>	<b>3,256,899</b>	<b>3,854,452</b>	<b>23,412,113</b>	<b>178,717</b>	<b>30,702,182</b>	Balances are informally "ring-fenced" by Block
<i>Balance as a % of 2023/24 Block value</i>	<i>0.6%</i>	<i>5.9%</i>	<i>19.2%</i>	<i>4.9%</i>	<i>4.2%</i>	
<b>1) Proposed to be allocated within the 2024/25 Schools Budget for specific agreed additional expenditure</b>						
Balance to be used in support of NNDR (Business Rates) cost increases until reimbursement via the APT	TBC				0	NNDR cost change will be reimbursed in future years via APT
Balance to be used in support of the 2024/25 Early Years Single Funding Formula - TBC estimated		1,133,957			1,133,957	Please see Document QN (2024/25 EYSFF update)
<b>Total proposed to be allocated into the 2023/24 Schools Budget for specific additional expenditure (estimated)</b>	<b>0</b>	<b>1,133,957</b>	<b>0</b>	<b>0</b>	<b>1,133,957</b>	
<b>2) Proposed either to be allocated to the 2024/25 Schools Budget in order to remove a deficit, or an underspending (surplus) proposed to be added to balances to be carried forward</b>						
2024/25 Schools Budget Support or Retention (Underspend). A negative = surplus retention into 2025/26 - TBC	-1,200,000		17,592,504	58,838	16,451,342	Confirmed figures are not yet available. Further discussion 10 January
<b>Total allocated to remove a deficit from the 2022/23 Schools Budget or to add an under-spend to balances</b>	<b>-1,200,000</b>	<b>0</b>	<b>17,592,504</b>	<b>58,838</b>	<b>16,451,342</b>	
<b>3) Proposed Balances to be retained at 1 April 2024</b>						
Retention of the De-Delegated Funds net total of balances forecasted to be held at 31 March 2024	625,148	71,709			696,857	Retained to support the cost of de-delegated funds in 2024/25 & on-going
Retention of the earmarked Disability Access Funds (DAF) monies within the Early Years Block		544,715			544,715	Estimated balance to be held at the end of 2023/24
Retention of the Estimated Falling Rolls Fund balance carried forward from 2023/24	500,000				500,000	Allocations for 23/24 will be presented in Mar 2024. However, no spend anticipated
Retention of the Estimated Growth Fund balance carried forward from 2023/24	1,110,677				1,110,677	Retained to support Growth Fund cost in 2024/25 & on-going
Block Resilience Reserve	2,221,074	2,104,071	5,819,609	119,879	10,264,634	Held for for DSG management planning in future years.
<b>Total of Balances Proposed to be Retained at 1 April 2024</b>	<b>4,456,899</b>	<b>2,720,495</b>	<b>5,819,609</b>	<b>119,879</b>	<b>13,116,883</b>	
<i>Retained Balance as a % of 2024/25 Block value</i>	<i>0.8%</i>	<i>4.1%</i>	<i>4.8%</i>	<i>0.0%</i>	<i>2.2%</i>	
<b>GRAND TOTAL BY BLOCK</b>	<b>3,256,899</b>	<b>3,854,452</b>	<b>23,412,113</b>	<b>178,717</b>	<b>30,702,182</b>	

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**SCHOOLS FORUM AGENDA ITEM**

For Action

For Information

**Brief Description of Item** (including the purpose / reason for presenting this for consideration by the Forum)  
 This report presents the annual statement to the Schools Forum on the sufficiency of specialist places for SEND.

**Date (s) of any Previous Discussion at the Forum**  
 This statement was last presented to the Schools Forum in December 2022.

**Background**  
 This statement is presented as per the schedule of high needs information, which was agreed with the Schools Forum on 14 October 2020.  
 Please see Appendix 1.

**Details of the Item for Consideration**  
 Please see Appendix 1

**Implications for the Dedicated Schools Grant (DSG)** (if any)  
 This is an item for information.  
 The Authority will present on 10 January an update of the fuller DSG Management Plan, which will show the estimated position of the High Needs Block over the next 4-year period.

**Recommendations**  
**Recommended – Members are asked to consider and to note the information presented in the report, in advance of the 10 January meeting.**

**List of Supporting Appendices / Papers** (where applicable)  
 Appendix 1 – Annual Sufficiency Statement SEND

**Contact Officer** (name, telephone number and email address)  
 Emma Hamer, Strategic Manager, Intelligence and Sufficiency  
 01274 439535  
[emma.hamer@bradford.gov.uk](mailto:emma.hamer@bradford.gov.uk)

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**Schools Forum Document QT Appendix 1**  
**SEND Places Sufficiency Statement November 2023**

**Introduction**

1. Bradford Metropolitan District Council (the 'Local Authority' or the 'Authority') has a statutory duty under The Education Act 1996 Section 14(1) to ensure a sufficient number of school places for all children and young people who are resident within the Bradford District. The Authority has specific duties to ensure that there is sufficient specialist provision available for children and young people with Education, Health and Care Plans (EHCPs), where their EHCPs determine that their needs should be met in specialist provision.
2. This annual statement to the Schools Forum sets out the analysis and processes, which enable the Local Authority to plan and to ensure the sufficiency of specialist places over the next three years. This statement highlights the projected scale of growth in the number of specialist places required to meet the projected increase in demand. It considers the number of places by type of provision that is projected to be required, if the current distribution of specialist places - between enhanced provisions (Resourced Provisions), local maintained special schools and special school academies, and mainstream maintained schools and academies - is projected into the future in line with the projected growth in demand for specialist places.
3. Further information can be found in the Strategic Plan 23 – Sufficiency of Specialist Places for Children and Young People of Bradford. This strategy is updated and published online, on an annual basis.

**Background**

4. The trajectory for the Bradford District remains unchanged with a continued increase in demand for Special Educational Needs and Disabilities (SEND) provision. Furthermore, it is projected that demand will continue to grow across all sectors.
- The total number of Education, Health and Care Plans (EHCPs) for 0–25-year-olds across the Bradford District was recorded as 6259 in November 2023. This has increased from 5309 on 22nd September 2022, 4842 recorded in October 2021 and 3,673 recorded in January 2019.
  - The number of requests for Education, Health and Care Assessments was recorded at 1970 between 1<sup>st</sup> September 2022 and 1<sup>st</sup> September 2023. This is a significant increase of 49% from the 1322 requests for assessment received between September 2021 and September 2022.
  - Of the 6259 children and young people with an EHCP 4481 or 71.6% are of statutory school age. This is an increase on the 68.3% recorded in September 2022 and 68.5% recorded in October 2021.
  - The number of children and young people on SEND Support aged between 0 – 25 years has increased by 12% between August 2022 and November 2023. This marks a change in the trend with this cohort decreasing by 0.17% between October 2021 and September 2022 and by 6.14% between October 2020 and October 2021.

Of the 14,672 children and young people aged between 0 - 25 years recorded in November 2023 on SEND support, 13,288 (91%) are of statutory school age, this is a slight decrease on the 92% recorded last year.

National Statistics at January 2023 (taken from the DfE Statistical Release; the SEN2 return and Census Data) compared with the Bradford District

National:

- 4.3% of all pupils in schools were recorded as having an Education, Health and Care Plan (EHCP), increased from 4.0% at January 2022, 3.7% at January 2021 and 3.3% recorded at January 2020.
- A further 13% of pupils were recorded as SEND support, increased from 12.6% at January 2022, 12.2% recorded at January 2021 and 12.1% recorded at January 2020.
- The most prevalent primary need recorded for pupils with an EHCP is for Communication and Interaction including Autistic Spectrum Disorders. For pupils with SEND support the most prevalent primary need recorded is for Speech, Language and Communication Needs. Both continue a trend since 2016.
- In England, SEND is more prevalent in boys than girls, with boys representing 72.4% of all pupils with an EHCP and 62.8% of pupils with SEND support.

Bradford:

- 3.9% of all pupils in schools were recorded as having an Education, Health and Care Plan, increased from 3.6% at January 2022, 3.4% recorded at January 2021 and 3.0% recorded at January 2020.
  - A further 13.5% of all pupils were recorded as SEND Support, representing a 0.5% increase from the 13.0% recorded at January 2021.
  - The most prevalent primary need for pupils in the Bradford District with an EHCP is for Communication and Interaction Needs including Autistic Spectrum Disorders, which reflects the same trend as the national picture. For pupils with SEND support, the most prevalent primary need recorded is for Speech, Language and Communication Needs. This is a slight change from last year when Moderate Learning Difficulties (MLD) was the most prevalent but was closely followed by Speech, Language and Communication Needs. This follows the national trend.
  - As with the national trend, SEND is more prevalent in boys than girls in the Bradford District, with boys representing 72% of all pupils with an EHCP and 66.5% of pupils with SEND support.
5. During the academic year 2022 to 2023, the Local Authority has created a further 100 specialist places across the District, meaning that in total since 2021 an additional 289 specialist places have been created. Please see Appendix 2 for full details of the additional places that have been created.

Current Position

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

Provision Type	Early Years	Primary	All Through	Secondary	Total
Special School & Special School Academies	0	521	114	896	<b>1,531</b>
Resourced Provisions School Led	0	182	0	165	<b>347</b>
Resourced Provisions Local Authority Led including ARCs	0	138	0	92	<b>230</b>
Early Years Enhanced Specialist Provision (headcount not FTE)	121	0	0	0	<b>121</b>
<b>Total Registered Places</b>	<b>121</b>	<b>841</b>	<b>114</b>	<b>1,153</b>	<b>2,229</b>



7. The table below shows the occupancy of these specialist places across the Bradford District in November 2023.

Provision Type	Number of Registered Places	Number of Occupied Places	Occupancy %
Special School & Special School Academies	1,531	1,439*	93%*
Resourced Provisions School Led	347	270*	78%*
Resourced Provisions Local Authority Led	230	198*	86%*
Early Years Enhanced Specialist Provision	121	105	87%
<b>Total Occupancy</b>	<b>2,229</b>	<b>2,012</b>	<b>90%</b>

*\*The occupancy data has been affected by the recent commissioning of 50 additional special school places, 36 secondary places in Resourced Provisions and 12 primary places in a Resourced Provision, which at the time of this data being collated had yet to be filled.*

The table below, extracted from the Sufficiency Statement presented to the Schools Forum this time last year, shows the occupancy of specialist places across the Bradford District in October 2022.

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

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

- The number of children and young people with an EHCP aged between 0 to 25 years has increased by 17.9% between September 2022 and November 2023. A significant increase on last year's increase of 9% between October 2021 and September 2022.
- The number of children and young people with an EHCP aged between 5 to 15 years (statutory school age) has increased by 15.2% between September 2022 and November 2023. This is a notable increase on last year's increase of 9% between October 2021 and September 2022.
- The number of requests for Education, Health and Care Assessments was recorded at 1970 between 1<sup>st</sup> September 2022 and 1<sup>st</sup> September 2023. This is a significant increase of 49% from the 1322 requests for assessment received between September 2021 and September 2022.

- 7.8% 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 around 7% for the last three 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.

## **Forecast (and Methodology)**

9. Our modelling clearly indicates that additional specialist places are required to be developed over the coming years in response to continued growth in the number of EHCPs and wider demographic changes in the school population. There are many variables that affect the current and future projections of the number of specialist places required in order to meet the needs of children and young people with SEND across the Bradford District, some of which are listed below:
  - There are a significant number of children and young people across the Bradford District on SEND Support. The data shows that there has been a substantial increase of 12% in the number of children and young people between 0 – 25 over the last year, compared with the previous year's slight decrease. Projections show that a proportion of this cohort will transfer onto an EHCP in the future, therefore, this increase is significant when future planning as it will contribute to the overall EHCP cohort.
  - Increase in the number of EHCPs.
  - 49% increase in the number of EHCP assessments.
  - High levels of occupancy in established specialist provisions.
10. We forecast that once a child or young person has moved into the EHCP cohort they will remain in that cohort. By analysing the flow of children and young people across each stream of SEND provision, we forecast that there will be an increase in the number of children and young people that will require access to a specialist place. Using a growth model for EHCPs, based on an average seen in the past three years' data, the Local Authority projects the following:
  - The number of children and young people between 0 - 25 with an EHCP in Bradford will increase by at least 15.6%, or 976.
  - Based on the average over the past three years, 69.5% of the above cohort will be of statutory school age. This would mean that by October 2024, this cohort would amount to 5028.
11. Our modelling clearly indicates that additional SEND specialist places are required to be developed, in response to the continued growth in the numbers of children and young people requiring EHCPs and access to a specialist placement, and also taking into account the current/projected high levels of occupancy of existing established provisions. Our forecast is regularly updated and tested against the latest available data including the tracking of the SEND cohort throughout all phases of education.

## **Summary & Conclusions**

12. Our current projection remains unchanged on that previously presented, in that we forecast that we will require an additional 100 to 120 specialist places within the current 2023/24 academic year, with these places being delivered across both the special school sector and within resourced provisions.
13. Our projections further show, as we have previously presented, that we will need to increase specialist places again by 100 to 120 for the 2024/25 academic year. This is the minimum number of specialist places that we project will be required to be developed in order to meet demand and to control (not increase reliance) on more expensive 'out of authority' placements.

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

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

**15.** The Local Authority's immediate actions for the next two academic years, in response to these projections and the identified key pressure points are:

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

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

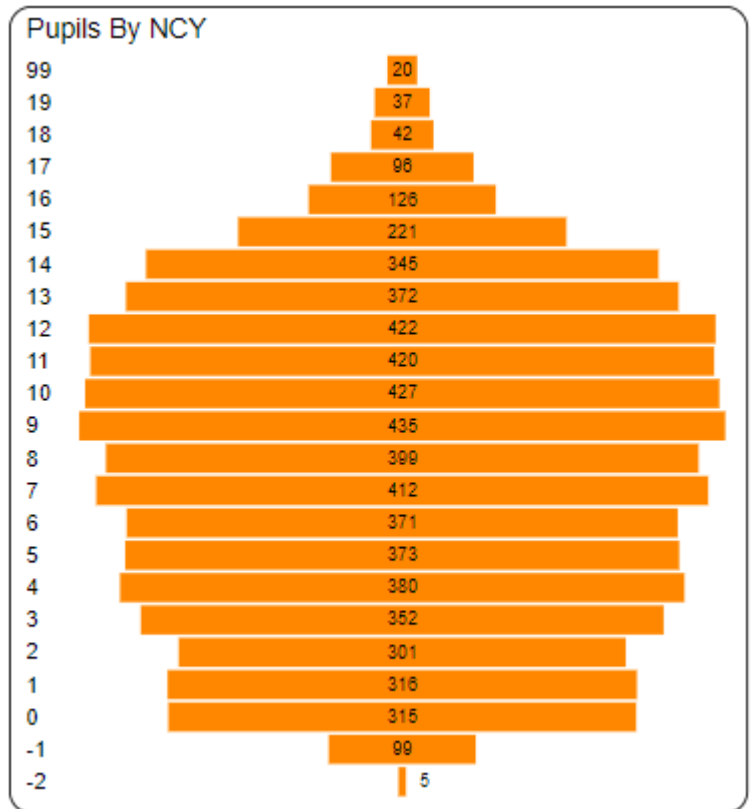
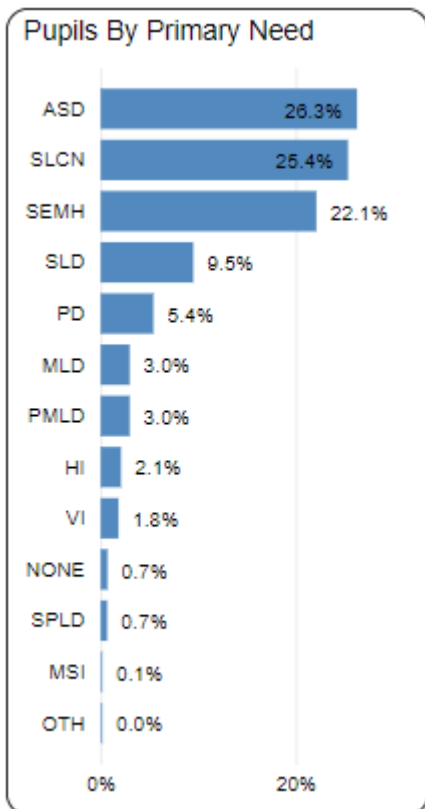
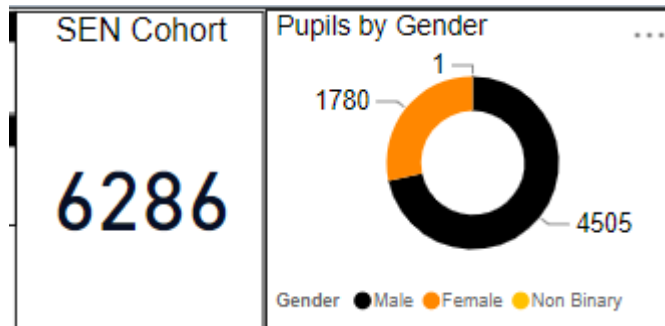
- Discussions are also ongoing with numerous schools and academies in the relevant areas regarding the development of further specialist places in the District.
- The Local Authority will include within the High Needs Block planned budget for the 2024/25 financial year, funding to meet the revenue cost of additional places.



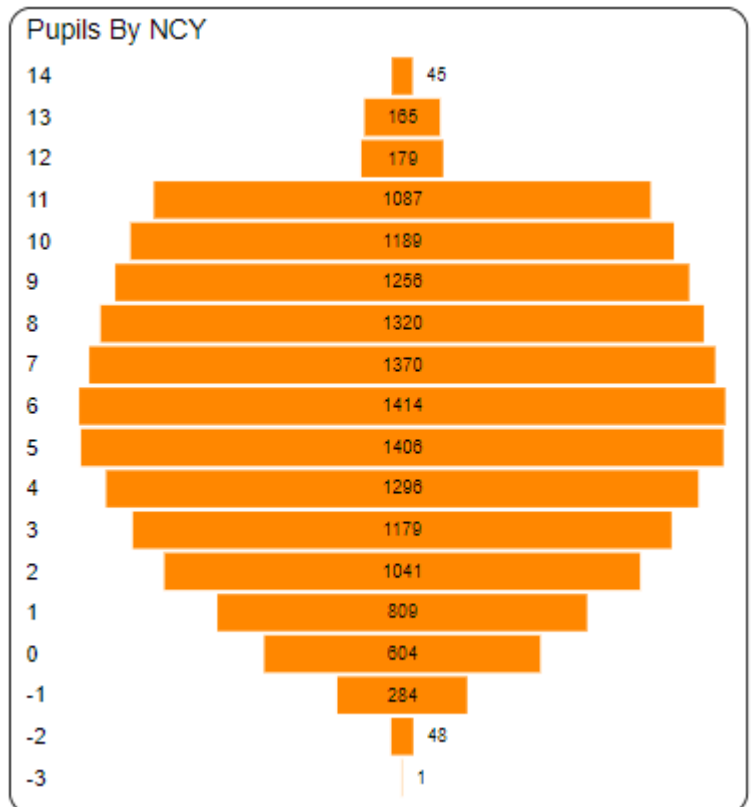
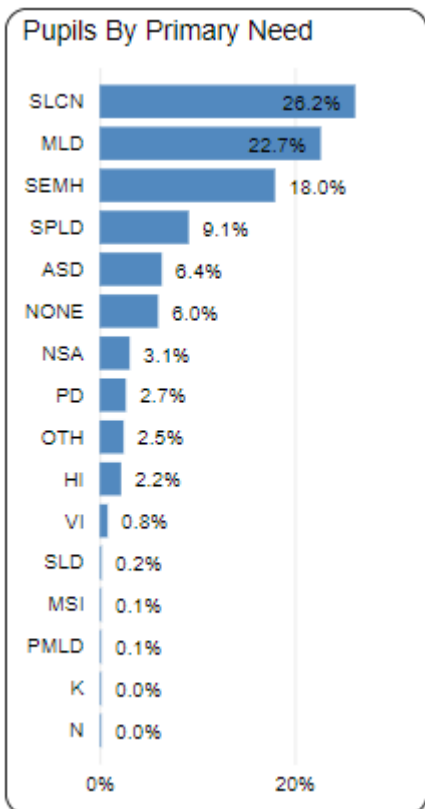
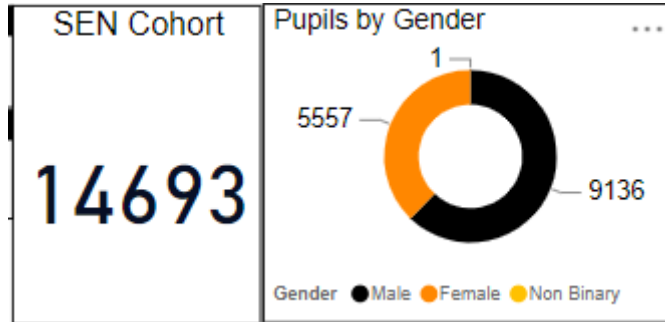
## Appendix 1

The data below has been taken from the SEND Dashboard. This is a live database used by Children Services. The data is constantly updated to reflect the changing situations of the children and young people within the Bradford District. The data below was extracted on 16 November 2023.

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



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



## Appendix 2

### List of new provisions/expansions opened between 2020 – 2021 and 2021 – 2022 and 2022 - 2023

#### Bradford East Constituency

Name	Primary Need	Provision	Primary/ Secondary/ All Through	No. of Additional Places	Ward	Year Places Created
Holybrook Primary School	Social, Emotional and Mental Health	RP-SL New Provision	Primary	16	Eccleshill	2020 - 2021
Fagley Primary School	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-LA New Provision	Primary	12	Eccleshill	2020 - 2021
Beechcliffe Thackley	Social, Emotional and Mental Health	Special School	Secondary	24	Idle and Thackley	2021 - 2022
Bradford Academy	Social, Emotional and Mental Health	RP-LA New Provision	Secondary	24	Bowling and Barkerend	2022 - 2023

#### Bradford South Constituency

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

Co-op Academy Southfield	ASD, SLD and PMLD Expansion of provision	Special School	Secondary	40	Great Horton	2022 - 2023
Co-op Academy Grange	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-SL Expansion	Secondary	12	Great Horton	2022 - 2023
Appleton Academy	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-LA New Provision	Primary	12	Wyke	2022 - 2023

### Bradford West Constituency

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

### Shipley Constituency

Name	Primary Need	Provision	Primary/ Secondary/ All Through	No. of additional Places	Ward	Year Places Created
Hirst Wood Nursery School	Generic 0-5 years	EYESP New Provision	Nursery	10	Shipley	2021 - 2022



Cottingley Primary School	Social, Emotional and Mental Health	RP-SL Expansion	Primary	4	Bingley Rural	2021 - 2022
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### Keighley Constituency

Name	Primary Need	Provision	Primary/ Secondary/ All Through	No. of Additional Places	Ward	Year Places Created
Long Lee Primary School	Social, Emotional and Mental Health	RP-SL Expansion	Primary	6	Keighley East	2020 - 2021
Parkwood Primary School	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-SL New Provision	Primary	12	Keighley East	2020 - 2021
The Holy Family Catholic School	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-SL Expansion	Secondary	4	Keighley Central	2020 - 2021
Worth Valley Primary School	Communication and Interaction Inc. Autistic Spectrum Disorder	RP-SL New Provision	Primary	8	Keighley West	2020 - 2021
Oastlers	Social, Emotional and Mental Health	Special School New Split Site	Secondary	30	Keighley West	2020 - 2021
Oastlers	Social, Emotional and Mental Health	Special School	Secondary	10	Keighley West & Bowling & Barkerend	2022 - 2023

The total number of additional specialist places created across the Bradford District between 2022 and 2023 was 100 with 189 additional specialist places previously created between 2020 and 2022.

## SCHOOLS FORUM AGENDA ITEM

For Action

For Information



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

This report asks Forum members to further consider the Authority's proposals for retention of Schools, Central Schools Services and Early Years Block central and de-delegated items in the 2024/25 financial year, following the initial discussion had in the last Forum meeting and in advance of the 10 January meeting.

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

An initial report on the funds that are proposed to be held in 2024/25 was presented to the Schools Forum at the last meeting (11 October 2023, Document QL). From this report:

- Members representing maintained primary schools decided that de-delegation for the purposes of subscribing to Fischer Family Trust should cease in 2024/25.
- Members did not request the review of any of the centrally managed funds presented in Document QL.

The Authority has requested feedback from schools and academies, on centrally managed funds, within the autumn 2023 consultations, including on the criteria / methodology for the allocation of Growth Funding, Falling Rolls Funding and de-delegated funds for maintained schools. Feedback on these consultations is reported back to this meeting under separate agenda items.

**Background / Context**

Please refer to Document QL 11 October 2023, which was written to initiate consideration of centrally managed funds to be held in the 2024/25 financial year.

**Details of the Item for Consideration**

Appendices 1 - 4 attached to this report set out for the Forum's review the Authority's indicative proposals for centrally managed funds to be held within the Schools Block, Early Years Block and Central Schools Services Block in the 2024/25 financial year.

- Appendix 1 – presents line by line information by block of the funds that are proposed to be held, the Authority's recommendation on the values of these funds and how the 2024/25 proposed arrangements compare with 2023/24. This appendix also shows the balances that are currently forecasted to be held in each existing fund at the end of the 2023/24 financial year, where specific balances are held.
- Appendix 2 – presents more detailed information on the contributions (and changes vs. 2023/24) proposed for de-delegated funds held for maintained schools within the Schools Block for the 2024/25 financial year. This appendix also shows in more detail the balances that are currently forecasted to be held in each de-delegated fund at the end of the 2023/24 financial year.
- Appendix 3 – lists for clarity the purposes for which the Authority can retain Central Schools Services Block monies for the former Education Services Grant funded statutory responsibilities the Authority holds in respect of all state funded schools and academies.
- Appendix 4 – presents for the Forum's information a summary of spending on school improvement in support of maintained schools across the 2022/23 academic year.

### Details of the Item for Consideration

We wish to highlight for the Forum's attention the following matters in relation to 2024/25 centrally managed funds within the Schools Block, Central Schools Services Block and Early Years Block, providing an update on the information that was presented to the Forum in Document QL on 11 October 2023.

#### Schools Block Maintained School De-Delegated Funds 2024/25 - Update

- We indicated in Document QL that, due to strong buy in, the contribution to the Authority's Trade Unions Facilities Time arrangements can be reduced in 2024/25 (by 5%). We propose now to take this reduction forward, meaning that the per pupil charge that is levied on maintained schools and academies that buy into the Authority's arrangements will reduce to 95% of the existing charge from April 2024, subject to final Forum agreement on 10 January. This reduced the total charge by £0.25 per pupil. This reduction is shown in Appendix 2.
- We set out in our mainstream formula funding consultation for 2024/25 how, due to the growth in salaries costs at the same time as the number of maintained primary schools continues to reduce year on year, our maternity / paternity insurance scheme is losing cost effectiveness and 'critical mass'. In our consultation we stated that we wish to signal now that we anticipate that this scheme will cease at the end of the 2024/25 academic year, meaning that reimbursements for all existing and new claims will stop at 31 August 2025. This message has been reinforced in the various presentations that have been made to business manager and headteacher / CEO groups during the consultation period.
- The Authority operates a de-delegated fund 'FSM Eligibility Assessments', which covers the work the Authority's Benefits Team does in relation to assessing Free School Meals (FSM) eligibility for pupils on behalf of maintained primary and secondary schools. Many academies also buy into this scheme. The charge is levied on an amount per FSM Ever 6 basis (the number of Ever 6 Free School Meals children each school or academy has on roll). This charge has not been increased (for the impact of pay awards or inflation) since the transfer of this scheme to a de-delegated fund back in 2016/17. Especially noting the impact of recent pay awards on the costs of delivery of the Authority's service, the Authority proposes to increase the charge per Ever6 FSM by 6% in 2024/25. We trust that this increase will be supported by the Forum.
- As we set out in Document QL on 13 October, since 2022/23, the Authority has retained, via de-delegation from both primary and secondary schools, funds to replace the monies that the Authority previously received via the DfE's now ceased School Improvement Monitoring and Brokering Grant (SIMB). De-delegation for this purpose equated to a £4.29 per pupil contribution in both 2022/23 and in 2023/24. We propose to continue de-delegation at £4.29 per pupil in 2024/25. Appendix 4 provides sight of the uses of this fund across the 2022/23 academic year in support of maintained schools. We continue to use the funds collected via de-delegation alongside the remaining balance of the SIMB grant funds that have been carried forward. We explained this position to the Schools Forum in Document PI Appendix 4a that was presented on 7 December 2022. On current estimates of school improvement spending, we anticipate that in the region of £312,000 of the SIMB grant funds balance will remain at the end of the 2023/24 financial year (meaning that we anticipate having spent c £90,000 of this balance in 2023/24 alongside 2023/24 sourced de-delegated funds and carry forward balance, which are fully spent).

#### Early Years Block Centrally Managed Funds 2024/25 - Update

- As we set out in Document QL, subject to the DfE's confirmation, we anticipate that the DSG condition, which restricts the retention of funds within the Early Years Block to 5% of total funding will remain in place for 2024/25 but will begin to move towards 3% as the roll out of the extended entitlements is completed. We expect that the 5% (then the final 3%) restriction will be in place for each of the 3 discrete early years entitlement funding streams (under 2s, 2-year-olds and 3&4-year-olds). We also stated that, in response to the extension of the entitlements, the Authority wishes to review the sufficiency of the capacities that are available, funded by the Early Years Block, to support delivery. This is in the light of the significant increase in the number of children that will access the entitlements for which providers will be funded, as well as other pressures, especially growth of SEND. The increase in the number of entitlement children, and the growth in SEND of these children, will have implications for the capacities that are required: to support SEND, sufficiency, sustainability, quality and compliance within the early years sector, to support the administration and calculation of entitlement funding, to support PVI providers with SEND (Area SENCOs) and to support the effective delivery of our Early Years SEND Inclusion Fund (EYIF).

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

- We are constructing a 2024/25 Early Years Block planned budget on the basis that significant additional funds must be earmarked for the Early Years Inclusion Fund (EYIF). These are funds that are retained at the start of the year but are allocated fully out to providers in support of identified eligible children. They do not count against the 5% restriction. We forecast that EYIF spending will increase by 40% this year and will continue to grow in 2024/25. On top of this, subject to confirmation by the DfE, it is expected that EYIF will be extended to all entitlements, meaning that the number of 2-year-old children that will be brought into EYIF will substantially increase and a new EYIF budget will need to be created for the under 2s entitlement. Given the already existing pressures on EYIF, and feedback from providers on EYIF processes, the Authority is currently looking at ways in which access to EYIF funding can be improved. We anticipate setting out proposals for consultation, which we will present to the Schools Forum on 10 January. These proposals may include a move to pilot a new EYIF approach in 2024/25 before deciding on more widescale changes in future years. In pulling together a budget and an approach, it is important to highlight that EYIF funding must be paid for (from the Early Years Block) and therefore, a substantial increase in EYIF funds must result in a reduction of funding that is allocated elsewhere, including a reduction in the values of the Universal Base Rates that providers receive for the delivery of the entitlements. We are very conscious therefore, that an appropriate balance must be achieved.
- Again, subject to DfE confirmation, it is expected that the Early Years Pupil Premium (EYPP) and the Disability Access Fund (DAF) streams will be extended across all the entitlements from April 2024. These streams currently are restricted to the 3&4-year-old entitlement. In the last couple of years, we have uplifted the DAF rate of funding to a level higher than the minimum that is prescribed and funded by the DfE, using Early Years Block reserves as a backstop for the funding of this. Going forward, such uplift may not be affordable, because reserves may not be available in the same way or to the same extent. This is currently a point of review, and we anticipate presenting proposals to the Schools Forum on 10 January. EYPP and DAF funds are retained at the start of the year but are allocated fully out to providers in support of identified eligible children. They do not count against the 5% restriction.
- Following review, we do not propose in 2024/25 to uplift the 'Early Years Support Capacity' centrally managed fund, other than by an allowance for pay award / inflation. However, we identify that the Authority's capacity is likely to need to be enhanced as the roll out of the new and extended entitlements continues. This is so that the Authority can continue to provide effective support to the early years sector. Therefore, this is a point of continued review and a proposal for an increase in capacity is likely to be brought forward for the 2025/26 budget round.
- The 'Early Years High Needs Support' budget is proposed to be uplifted in 2024/25 in total by £0.309m. £0.054m of this provides uplift for pay award / inflation on existing budgets. The 2024/25 budget is then proposed to be increased by £0.255m in response to pressures, as follows:
  - An additional £0.06m for Area Inclusion (Area SENCOs) capacity that is required to support the PVI sector in response to the significant growth of SEND and growth in the number of EYIF claims, as well in response to the new entitlements (that will mostly be delivered in the PVI sector). It is anticipated that this capacity will need to be further enhanced as the new entitlements extend and establish in 2025/26. Therefore, this is a point of continued review and a proposal for further increase in capacity is likely to be brought forward for the 2025/26 budget round.
  - An additional £0.195m to meet existing spending pressures within early years SEND support services and in support of early years providers. This includes spending on early years portage, educational psychology support for early years providers, and early years SEND parental support workers. This additional contribution is also supporting the Council's budget in the management of increased costs (ensuring that the Early Years Block continues to make legitimate and appropriate contribution to the cost of support services as the cost of these services increases).

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

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

**Recommendations**

- (1) Members are asked to note the information provided in the report.
- (2) Members are asked to consider whether any further information is needed to enable final recommendations and decisions to be taken / made on 10 January 2024 on the funding of centrally managed and de-delegated Early Years, Schools and Central School Services Block items in 2024/25.

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

- Appendix 1 – Detailed Summary of Schools, Early Years and Central Schools Services Block funds.  
Appendix 2 – Analysis of Per Pupil Contributions to Schools Block De-Delegated Funds & Forecasted carry Forward Balances.  
Appendix 3 – Description of Statutory Duties permitted by the funded by the transferred ESG Centrally Retained Duties grant.  
Appendix 4 – School Improvement Fund Spend 2022-23 Academic Year.

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

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

**1) De-Delegated Funds held within the Schools Block (Maintained Primary & Secondary Schools)**

Ref	Fund	Initial New Cash Value Retained from 2023/24 Schools Budget	Local Authority Recommendation for the 2024/25 Financial Year	Recommended INITIAL New Cash Value Retained from 2024/25 Schools Budget	Change in Fund Value in 2024/25 (negative = reduction)	Estimated Fund Specific Balance Carried Forward from 2023/24	Total Funding Available 2024/25 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 budget de-delegation from the primary phase in 2024/25 and review for 2025/26 (use Balance Carried Forward where necessary). No secondary phase De-Delegation.	£0	£0	£98,437	£98,437
3	Exceptional Costs & Schools In Financial Difficulty (Primary phase only)	£54,500	Continue De-Delegation from the primary phase, recovering the same £app as in 2023/24. Continue existing criteria. No secondary phase De-Delegation.	£45,900	£-8,600	£85,486	£131,386
4	Costs of FSM Eligibility Assessment	£38,007	Continue De-Delegation from both the primary and secondary phases on the 2023/24 £apFSM contribution plus 6%.	£30,359	£-7,648	£-5,498	£24,862
5	Fischer Family Trust - School Licences (Primary phase only)	£24,238	The decision to cease de-delegation from the primary phase in 2024/25 has already been taken by the Schools Forum on 11 October 2023. No secondary phase de-delegation.	£0	£-24,238	£-946	£-946
6	Trade Union Main Facilities Time	£113,813	Continue De-Delegation from both the primary and secondary phases on same basis as 2023/24 but with a 5% reduction in the £amount per pupil contribution.	£84,205	£-29,609	£310,102	£394,307
7	Trade Union Health & Safety Facilities Time	£17,392	Continue De-Delegation from both the primary and secondary phases on same basis as 2023/24 but with a 5% reduction in the £amount per pupil contribution.	£12,867	£-4,524	£0	£12,867
8	School Improvement	£112,655	Continue De-Delegation from both primary and secondary phases on the same basis as 2024/25 (same £amount per pupil contribution).	£87,735	£-24,921	£0	£87,735
9	School Maternity / Paternity 'insurance' fund (Primary phase only)	£552,523	Continue De-Delegation from the primary phase at a value forecasted to afford the scheme in 2024/25, minus the deployment of a proportion (£0.10m) of the estimated fund balance carried forward from 2023/24. No secondary phase De-Delegation. Planned cessation of the primary phase de-delegation at the end of the 2024/25 academic year.	£498,054	£-54,469	£136,324	£634,378
10	School Staff Public Duties & Suspensions Fund (Primary Phase only)	£19,466	Continue De-Delegation from the primary phase recovering the same £app as in 2023/24. Continue existing criteria. No secondary phase De-Delegation.	£16,353	£-3,113	£1,243	£17,595
<b>Total Schools Block De-Delegated Funds</b>		<b>£947,437</b>		<b>£790,315</b>	<b>£-157,122</b>	<b>£625,148</b>	<b>£1,415,463</b>

**2) Schools Block Growth Fund & Falling Rolls Fund**

Ref	Fund	Initial New Cash Value Retained from 2023/24 Schools Budget	Local Authority Recommendation for the 2024/25 Financial Year	Recommended INITIAL New Cash Value Retained from 2024/25 Schools Budget	Change in Fund Value in 2024/25 (negative = reduction)	Estimated Fund Specific Balance Carried Forward from 2023/24	Total Funding Available 2024/25 inc. specific carry forward balance
11	Growth Fund (net of the reimbursement via recoupment for academies growth fund allocations for the period April - Aug)	£796,883	Continue the existing Growth Fund allocation criteria and make budget provision at a value to meet forecasted costs in 2024/25. The fund that is proposed does not take budget for new growth in the primary phase, with carried forward balance available. A value of £0.950m is proposed to be taken for growth allocations to the secondary phase, for expansions at 1 September 2024. A list of known (existing expansion) allocations will be presented for the Schools Forum's approval in the January meeting.	£1,119,343	£322,459	£1,110,677	£2,230,020
12	Falling Rolls Fund (Primary Phase Only)	£0	Continue the Falling Rolls Fund as proposed in the autumn consultation, but do not take new budget provision from the 2024/25 Schools Block. £0.50m expected balance to be carried forward into 2024/25.	£0	£0	£500,000	£500,000
<b>Total Growth Fund &amp; Falling Rolls Fund</b>		<b>£796,883</b>		<b>£1,119,343</b>	<b>£322,459</b>	<b>£1,610,677</b>	<b>£2,730,020</b>

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

Ref	Fund	Initial New Cash Value Retained from 2023/24 Schools Budget	Local Authority Recommendation for the 2024/25 Financial Year	Recommended INITIAL New Cash Value Retained from 2024/25 Schools Budget	Change in Fund Value in 2024/25 (negative = reduction)	Estimated Fund Specific Balance Carried Forward from 2023/24	Total Funding Available 2024/25 inc. specific carry forward balance
13	Schools Forum Running Costs	£11,700	Continue at the 2023/24 cash value, adjusted for pay / inflation funded from the CSSB headroom, supported by CSSB balance.	£12,400	£700	£0	£12,400
14	Pupil Admissions	£987,000	Continue at the 2023/24 cash value, adjusted for pay / inflation funded from the CSSB headroom supported by CSSB balance.	£1,066,000	£79,000	£0	£1,066,000
15	DfE Copyright Licences (national framework for all state funded schools)	£406,355	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.	£315,185	-£91,169	£0	£315,185
16	Former ESG funded Statutory Duties (the Council's statutory responsibilities relating to all state funded schools and academies). Please see Appendix 3.	£1,559,300	Continue to passport the value of the transferred Grant back to the Authority at the same cash value as 2023/24 plus some allowance fo pay / inflation funded from the CSSB headroom, supported by CSSB balance.	£1,599,300	£40,000	£0	£1,599,300
17	Education Access Officers (attendance and education welfare)	£500,000	Continue at the 2023/24 cash value, adjusted for pay / inflation funded from the CSSB headroom, supported by CSSB balance.	£540,000	£40,000	£0	£540,000
18	Education Services Planning and Consultation	£148,000	Continue at the 2023/24 cash value, adjusted for pay / inflation funded from the CSSB headroom, supported by CSSB balance.	£156,900	£8,900	£0	£156,900
19	CSSB 'Resilience' Provision (DSG Management Planning)	£0	We do not propose to hold new resilience provision in 2024/25.	£0	£0	£119,879	£119,879
<b>Total Central Schools Services Block Funds</b>		<b>£3,612,355</b>		<b>£3,689,785</b>	<b>£77,431</b>	<b>£119,879</b>	<b>£3,809,665</b>

### 4) Centrally Managed Funds held in the Early Years Block



Ref	Fund	Initial New Cash Value Retained from 2023/24 Schools Budget	Local Authority Recommendation for the 2024/25 Financial Year	Recommended INITIAL New Cash Value Retained from 2024/25 Schools Budget	Change in Fund Value in 2024/25 (negative = reduction)	Estimated Fund Specific Balance Carried Forward from 2023/24	Total Funding Available 2024/25 inc. specific carry forward balance
20	Maintained Nursery Schools access to Schools Block de-delegated funds	£119,330	Continue current arrangements, whereby Nursery Schools access Schools Block de-delegated items.	£122,378	£3,049	£71,709	£194,087
21	DfE Copyright Licences (national framework for all state funded schools) - EYB element	£36,468	Continue to charge the Early Years Block for the Early Years proportion of the actual cost set by the DfE. Apportionment adjusted for new and expanded entitlements in 2024/25. TBC	£114,613	£78,145		£114,613
22	EYSFF - Early Years SEND Inclusion Fund Under 2s	£0	Subject to DfE confirmation TBC - EYIF is expected to be extended across all entitlements from April 2024, so a new EYIF budget for under 2s must be created for the beginning of this entitlement at Sept 2024 (part year). The cost of EYIF here is significantly estimated at this stage. It is anticipated that proposals for our holistic EYIF allocation mechanism will be presented to the Forum on 10 January. Note that EYIF budgets are allocated to providers during the year.	£90,000	£90,000		£90,000
23	EYSFF - Early Years SEND Inclusion Fund 2 Year Olds	£100,000	Subject to DfE confirmation TBC - EYIF is expected to be extended across all entitlements from April 2024, so an extended EYIF budget for 2 year olds must be put in place at April 2024. The cost of EYIF here is significantly estimated at this stage. It is anticipated that proposals for our holistic EYIF allocation mechanism will be presented to the Forum on 10 January. Note that EYIF budgets are allocated to providers during the year.	£400,000	£300,000		£400,000
24	EYSFF - Early Years SEND Inclusion Fund 3 & 4 Year Olds	£550,000	It is anticipated that proposals for our holistic EYIF allocation mechanism will be presented to the Forum on 10 January. Note that EYIF budgets are allocated to providers during the year. The number of EYIF applications has significantly increased in 2023/24 (+40%) and cost is expected to continue to grow in 2024/25. We have sought to reflect this by increasing budget provision in 2024/25. This budget increase is estimated at this stage, also pending DfE confirmation on EYIF processes for 2024/25.	£1,080,000	£530,000		£1,080,000
25	EYSFF - Early Years Pupil Premium	£437,089	To be delegated to providers for eligible children during the year, with the fund held centrally at the start of the year. Note that it is expected that EYPP will be extended across all the early years entitlements in 2024/25 (previously limited to just the 3&4 year old entitlement). Subject to DfE confirmation on EYPP arrangements.	£547,520	£110,431		£547,520
26	EYSFF - Disability Access Fund	£120,000	To be delegated to providers for eligible children during the year, with the fund held centrally at the start of the year. Note that it is expected that DAF will be extended across all the early years entitlements in 2024/25 (previously limited to just the 3&4 year old entitlement). Subject to DfE confirmation on DAF arrangements. Any proposals to continue to enhance the DAF value in Bradford will be discussed within the EYSFF consultation, anticipated to be presented to the Forum on 10 January.	£288,144	£168,144	£544,715	£832,859
27	Early Years Support Capacity (provider sustainability, quality, EYSFF delivery and communication, funding compliance)	£530,000	Continue the Early Years Block's contribution to early years provider support functions / services at the 2023/24 budget value plus allowance for pay award / inflation.	£562,000	£32,000		£562,000
28	Early Years High Needs Support (Centrally Managed Area SENCOs for PVI providers, EY SEND Support, including Portage)	£582,000	Continue existing 2023/24 budget contributions with allowance for pay award / inflation, plus additional budget allocated in response to growth in service pressures and to enable additional capacity in response to EYIF pressures and from the extension of the entitlements. Please see Document QU for more information.	£891,000	£309,000		£891,000
<b>Total Early Years Block Funds</b>		<b>£2,474,886</b>		<b>£4,095,655</b>	<b>£1,620,769</b>	<b>£616,424</b>	<b>£4,712,079</b>

<b>Value of EYB Funds counted towards the Central Budget restriction</b>	<b>£1,367,797</b>
<i>Sub total - under 2s entitlement</i>	<i>£0</i>
<i>Sub total - 2 year old entitlements</i>	<i>£0</i>
<i>Sub total - 3&amp;4 year old entitlements</i>	<i>£1,367,797</i>

<b>£1,689,991</b>
<i>£236,624</i>
<i>£410,830</i>
<i>£1,042,537</i>

	2023/24 DSG Planned Budget	Total Indicative Proposed Value 2024/25	Early Years Total Value	Primary Total Value	Secondary Total Value	2024/25 Value £PP			2023/24 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	38,007	30,359		26,527	3,832											
Fischer Family Trust - School Licences	24,238	0								£1.16					-£1.16	
School Maternity / Paternity 'insurance' fund	650,000	600,000	101,946	498,054		£28.32	£28.32		£26.44	£26.44				£1.88	£1.88	
Trade Union Facilities Time	129,790	99,025	14,820	72,404	11,800	£4.12	£4.12	£4.12	£4.33	£4.33	£4.33			-£0.22	-£0.22	
Trade Union Health & Safety Time	19,833	15,132	2,265	11,064	1,803	£0.63	£0.63	£0.63	£0.66	£0.66	£0.66			-£0.03	-£0.03	
School Staff Public Duties & Suspensions Fund	22,900	19,700	3,347	16,353		£0.93	£0.93		£0.93	£0.93				£0.00	£0.00	
Exceptional Costs & Schools In Financial Difficulty	54,500	45,900		45,900			£2.61			£2.61					£0.00	
School Re-Organisation Costs (Safeguards)	14,842	14,842		13,818	1,024		£0.79	£0.36		£0.66	£0.19				£0.12	£0.17
School Re-Organisation Costs (Deficits)	0	0		0			£0.00			£0.00					£0.00	
School Improvement	112,655	87,735		75,440	12,295		£4.29	£4.29		£4.29	£4.29				£0.00	£0.00
<b>TOTAL Value Of De-Delegated Funds / £APP</b>	<b>1,066,766</b>	<b>912,693</b>	<b>122,378</b>	<b>759,560</b>	<b>30,754</b>	<b>£34.00</b>	<b>£41.69</b>	<b>£9.39</b>	<b>£32.37</b>	<b>£41.09</b>	<b>£9.48</b>	<b>£1.63</b>	<b>£0.59</b>	<b>-£0.08</b>		

Please note that the initial planned budget cash value of de-delegated funds in 2024/25 is subject to confirmation (taking account of 1 January 2024 academy conversions).

De-Delegated Funds: Estimated 2023/24 Spending Position / End of Financial Year Balance (to be carried forward into 2024/25)

Fund	Brought Forward Balance from 22/23	Estimated 23/24 In Year Under / Over (-) Spend Position	Estimated Carry Forward Balance into 24/25	Comments
Costs of FSM Eligibility Assessment	0	-5,498	-5,498	Assumed overspend due to budget reductions following academy conversions TBC
Fischer Family Trust - School Licences	1,305	-2,251	-946	Small adjustment for confirmed buy in & academy conversions TBC
School Maternity / Paternity 'insurance' fund	309,352	-101,319	208,033	Planned £0.10m release of balance. Proposed to continue release (£0.10m) in 24/25
Trade Union Facilities Time inc. Health and Safety	327,135	-17,033	310,102	Estimated on projected income and re-charges, which are TBC. Proposal to reduce to 95%
School Staff Public Duties & Suspensions Fund	-8,691	9,934	1,243	Possible spend in 23/24 still to add TBC.
Exceptional Costs & Schools In Financial Difficulty	150,399	-64,913	85,486	Allocation using criteria to maintained primary schools.
School Re-Organisation Costs (Safeguards & Deficits)	100,000	-1,564	98,437	Assumed budget adjust. for conversions. Held for deficit primary sponsored academies.
School Improvement	61,797	-61,797	0	Please see Document QU. Balance and 23-24 budget estimated to be fully spent.
<b>Total Balance of De-Delegated Funds</b>	<b>941,297</b>	<b>-244,440</b>	<b>696,857</b>	

Schools Block proportion of estimated de-delegated funds balance	625,148
Early Years Block proportion of estimated de-delegated funds balance	71,709

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## **Schools Forum Document QU Appendix 3**

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

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

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

### **Statutory and Regulatory Duties**

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

### **Education Welfare**

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

### **Asset Management**

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

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## School Improvement and Monitoring Grant Academic Year 2022 - 2023

2022-23	Level of support	Main cost areas	Cost 2022-23	Impact to date
	High	<p>Chair - No governance capacity to lead governors and School Improvement.            Early Years Consultant support; LA Advisor intensive support            Governor training</p> <p><i>Risk: school would go into category – weak provision.</i></p>	<p>£6,250            £8,000</p>	<p>Impact: leadership improving with DHT and new AHT.            Provision stronger.            GB significantly stronger.</p>
	Medium	<p>School to school support (HT)            Early years Consultant support; LA Advisor intensive support            Governor Advice/training</p> <p><i>Risk: school would go into category due to leadership – weak provision.</i></p>	<p>£1,750            £6,000</p>	<p>Impact: variable - Significant leadership and budget concerns</p>
	Very High	<p>Intensive School to school support            Exec Headteacher            DHT, SENCO, SBM backfill            Early Years support from consultant            Governor Advice/training</p> <p><i>Risk: school would go into category due to leadership and provision.</i></p>	<p>£90,577            £3,000</p>	<p>Rapid improvement due to quality of executive leadership.            Secured Good judgement.            Impact – Significant and sustained</p>
	Very High	<p>Chair - need to improve governance            School to school support – Consultant Headteacher            Intensive Advisor and Early Years consultant            Governor Advice/training</p> <p><i>Risk: school would go into category due to long term leadership issues.</i></p>	<p>£27,840            £11,000</p>	<p>Impact: Secured RI judgement.            – variable –            Leadership being developed            GB significantly stronger</p>

	Medium	Chair LA Advisor / EY intensive support. Backfill for staff CPD Additional HR costs Risks: School would go into category	£2,000 £4,000	Impact: Secured RI judgment. Leadership needs support. Variable provision but is improving.
	Medium	Chair School to school support Early Years consultant/LA advisor Governance support and training Risks: School would go into category	£2,375 £4,000	Impact: Leadership secure. Provision improving.
	Low	School to school support	£3,300	School stable
	Medium	School to school support	£5,000	School stable
All schools causing concern	High	50% salary contribution 1 staff member  Governance advice/training and Intervention support Focussed support for governance in schools causing concern.	£28,000 £36,860	Impact: rapid improvements - governing boards supported in improving practice and efficacy
		New heads support 9 schools @ £2500 Mentor	£22,500	New heads supported to be effective and ensure their schools are compliant
Total 2022-2023 spend			£262,452	