

SCHOOLS FORUM AGENDA ITEM

For Action



For Information

**Brief Description of Item**

Members are asked to consider and agree newly proposed allocations to schools and academies from the established DSG Growth Fund in 2017/18.

Date (s) of any Previous Discussion at the Forum

The criteria for funding expanding schools and bulge classes in 2017/18 were included as part of the consultation on Primary and Secondary funding in 2017/18, and were agreed by members prior to submission of our final pro-forma to the EFA in January 2017.

Background / Context

As was the case in 2016/17, the School and Early Years Finance (England) Regulations 2017 allow for a Growth fund to be held and managed centrally within the DSG. The Regulations require that this fund is:

- ringfenced i.e. cannot be spent on any other purpose. Any unspent growth funding remaining at the year-end should be reported to the Schools Forum. Funding may be carried forward to the following funding period, and can be used 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 recouplement academy budgets contributing to the cost of this fund prior to new delegation).

The Regulations also require that local authorities consult their Schools Forum before incurring any expenditure due to a significant growth in pupil numbers as a result of the local authority's duty under section 13(1) of the 1996 Act to secure that efficient primary education and secondary education are available to meet the needs of the population of their area. How the Growth fund operates is for local determination.

The criteria and mechanisms for allocating funding from the Growth fund were agreed by Forum members following the consultation process in October 2016, and were part of our final funding pro-forma submitted to the EFA in January 2017. The consultation included the clarification and establishment of the basis for the funding of growth in the secondary phase. Funding has already been allocated and agreed for existing primary expansions and bulge classes in 2017/18; this funding was included in 2017/18 Section 251 Budget statements (and in Authority payments to academies).

The agreed criteria and mechanisms for allocating growth funding to primary schools / academies in 2017/18 are as follows:

- Where a school / academy is expanding or admitting a bulge class for the first time in September 2017, the school / academy is allocated 80% of the value of the 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

The agreed criteria and mechanisms for allocating growth funding to secondary schools / academies in 2017/18 are as follows:

For secondary schools / academies either 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 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 in the first year is calculated on actual numbers and allocated only once actual October Census numbers are confirmed (so for additional pupils in September 2017, 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 2017 Census).
- Funding is allocated only 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 schools and 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 2017, 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). On 2017/18 values this would give £3,215 per pupil. 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, the additional allocation will be included within the school's / academy's initial budget. Funding is calculated on the difference between the October 2016 census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers, based on an estimate of the school's October 2017 Census. 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. On indicative 2017/18 values this would give £3,215 per pupil. At the point the school's expansion reaches Key Stage 4, 80% of the Key Stage 4 base £app will be used (which is £3,405).
- 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 2 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.

Details of the Item for Consideration

This paper asks members to consider allocations from the Primary Growth fund to 2 primary schools that are expanding for the first time from September 2017; the funding will support an increase in provision as follows:

- **Addingham Primary School** will increase in admission number for 1 year (half bulge class) from 30 to 45 pupils from September 2017, resulting in an allocation of **£39,148** in 2017/18 and then £33,556 (indicatively) annually for the lifetime of the bulge class. Please note that the Authority has employed exceptional criteria in the allocation of full bulge class funding in 2017/18 only, due to the school's overall financial position and ability to finance a bulge class in the initial 2017/18 period.
- **Parkland Primary School** will increase in admission number (permanently) from 30 to 60 pupils from September 2017, resulting in an allocation of **£39,148** in 2017/18 and then indicatively on an annual basis until the school is fully established at 2 forms of entry.

Please note that allocations for expansions in the secondary phase at September 2017 will be presented to the Schools Forum for agreement in October (following the confirmation of October Census numbers). Indicative values will be provided to schools and academies prior to this for their planning purposes.

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

The Forum has set aside the following values of Growth Fund for new expansions during 2017/18:

- Primary £300,000
- Secondary £680,000

The remaining balance of the Primary Growth Fund in 2017/18, after the 2 allocations set out above, will be £221,704. No allocations have yet been formally agreed by the Schools Forum from the Secondary Growth Fund (will be presented in October).

How does this item support the achievement of the District's Education Priorities

The Bradford District has one of the fastest growing populations in the country leading to an increased demand on the available places. This increase in demand is being addressed through a phased expansion of a number of primary schools and academies across the district. The Local Authority has a duty to ensure that sufficient high-quality provision is available to meet the needs of all Bradford District children.

Allocations of funding from the Growth Fund are necessary to support schools and academies throughout their expansion in order that the District meets the demands of the local population.

Recommendations

Primary Forum members are asked to agree to allocate a total of £78,296 from the Primary Growth Fund to the following schools in 2017/18:

- **Addingham Primary School £39,148**
- **Parkland Primary School £39,148**

List of Supporting Appendices / Papers

None.

Contact Officer (name, telephone number and email address)

Sarah North, Principal Finance Officer
01274 434173
sarah.north@bradford.gov.uk