

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 Schools Block Growth Fund in 2018/19.

Date (s) of any Previous Discussion at the Forum

The criteria for funding expanding schools and bulge classes in 2018/19 were included as part of the consultation on Primary and Secondary funding in 2018/19, and were agreed by members prior to submission of our final Schools Block pro-forma to the ESFA in January 2018.

Background / Context

As was the case in 2017/18, the School and Early Years Finance (England) Regulations 2018 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:

- 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 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 also require that local authorities consult their Schools Forum before incurring any expenditure. How the Growth Fund operates is still currently for local determination but is currently under review within the National Funding Formula transition.

The criteria and mechanisms for allocating funding from the Growth Fund in Bradford were agreed by Forum members following the consultation held in October 2017, and were part of our final Schools Block APT (pro-forma) submitted to the ESFA in January 2018. Funding has already been allocated and agreed for existing primary expansions and bulge classes in 2018/19; this funding was included in 2018/19 Section 251 Budget statements for maintained schools and in Authority payments to academies.

The agreed criteria and mechanisms for allocating growth funding to primary schools / academies in 2018/19 are the same as in 2017/18 and are, in summary, as follows:

- Where a school / academy is expanding or admitting a bulge class for the first time in September 2018, the school / academy is allocated 80% of the value of the 2018/19 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 2018/19 are the same as in 2017/18 and are, in summary, 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 is calculated on actual numbers and allocated only once actual October Census numbers are confirmed (so for additional pupils in September 2018, 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 2018 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 2018, 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 2017 Census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers incorporating the school's October 2018 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 current forecasts of September 2018 pupil numbers in the secondary phase and in the numbers of additional pupils that will be admitted, all Growth Funding allocations to secondary schools and academies (both new and existing expansions) for the 2018/19 year will be checked against actual October 2018 Census numbers before being confirmed. This is a slightly different approach for existing expansions from what was set out in the autumn 2017 consultation.

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 2018; the funding will support an increase in provision as follows:

- **All Saints Ilkley Primary School** will increase in admission number (permanently) from 45 to 60 pupils from September 2018, resulting in an allocation of **£19,233** in 2018/19 and then indicatively on an annual basis until the school is fully established at 2 forms of entry *.
- **Poplars Farm Primary School** will increase in admission number (permanently) from 30 to 60 pupils from September 2018, resulting in an allocation of **£38,465** in 2018/19 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 2018 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. * Please also note that the ESFA is currently reviewing the methodology for the allocation of Growth Funding under National Funding Formula and this may affect the values of allocations for individual growing schools in future financial years.

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

The Forum has set aside the following values of Growth Fund for new expansions during 2018/19:

- Primary £314,131
- Secondary £700,000

The remaining balance of the Primary Growth Fund in 2018/19, after the 2 allocations set out above, will be £256,433. 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 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 £57,698 from the Primary Growth Fund to the following schools in 2018/19:

- All Saints Ilkley Primary School £19,233
- Poplars Farm Primary School £38,465

List of Supporting Appendices / Papers

None.

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