

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 the Forum with a summary of the number of maintained schools in each category, within the “Financial Classification of Schools”, for the 2018/19 Academic Year.

Date (s) of any Previous Discussion at the Forum

The Financial Classification of Schools was last presented to the Schools Forum on 5 July 2017.

Background / Context

The Classification is a set of criteria used by the Local Authority to identify maintained schools in greatest need of financial support and to carry out a programme of annual detailed budget discussions with these schools. The Classification is calculated on an academic year basis, and is updated each year. The Financial Classification system was established in July 2006. The Classification is an alpha-numeric system with Categories A (highest level of support) B, C and D (lowest levels of support). A school is placed into a category, based mostly on the information taken from its approved 3 year budgets and outturn from the previous financial year.

Details of the Item for Consideration

This information is presented to the Schools Forum in the context of the discussions that have taken place on the liabilities that may crystallise with a school's conversion to academy status and what action is taken by the Authority to prevent deficit budgets. The table below shows the initial calculation of number of maintained schools in each category in the 2018/19 Academic Year Financial Classification. This assumes that no further conversions of maintained schools to academy take place.

	Category A	Category B	Category C	Category D
Nursery	0	1	1	5
Primary	15	3	41	38
Secondary	4	0	1	2
Special	0	0	4	0
PRUs	0	3	2	2
Total	19	7	49	47

Category A: School in deficit, recently in deficit or vulnerable to deficit, closing / opening schools (highest level of support)

Category B: Schools with excess surplus balances / trigger the forecasting accuracy criteria

Category C: Schools forecasting deficits or vulnerability to deficit in 2nd or 3rd year budgets

Category D: Normal level of support

The table below shows the change in the number of schools in each category from the 2017/18 Academic Year Financial Classification (on an equivalent basis i.e. removing schools that have converted to academy).

	Category A	Category B	Category C	Category D
Nursery	same	+1	-1	same
Primary	+1	-4	+12	-9
Secondary	same	same	same	same
Special	-1	same	+2	-1
PRUs	same	same	+1	-1
Total	same	-3	+14	-11

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

None

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

This is an item for information. It is important for Forum members to be aware of the support framework for maintained schools. The information in this paper provides more detail of one of the ways in which the Authority supports and challenges maintained schools.

Recommendations

The Forum is asked to consider and to note the information provided in this paper.

List of Supporting Appendices / Papers (where applicable)

None

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