

ESFA Disapplication Request - Silsden Primary School 2019/20 Lump Sum

At 1 September 2017, Aireview Infant School and Hothfield Junior School merged to form Silsden Primary School.

Following a disapplication request, we funded the newly amalgamated school so that it retained in 2018/19 the equivalent of 85% of the predecessor schools' lump sums. This meant that the school received a lump sum of £187,000 rather than £110,000. This adjustment in the first financial year post amalgamation is a requirement of the Regulations. Its purpose is to support financial stability in the immediate aftermath, recognising that the new school may very well still operate across 2 sites and have additional fixed costs, as well as staffing and leadership costs, related to this.

In 2018/19 therefore, Silsden Primary School received an additional £105,000 in total to support its financial position and transition:

- Protected amalgamated lump sum at 85% (an additional £77k on the value of lump sum for a single school).
- Split site funding £28k.

Silsden Primary School will continue to operate over the 2 old school sites until September 2020, when it is expected the school will move onto a new single site. Recognising this, but also recognising that the school will have additional costs associated with the move to a new site, which it aims to retain its carry forward balance to support, following recent discussion with the school, we propose to submit a disapplication request to provide in 2019/20 a 2nd year of lump sum amalgamation protection, at 70% of the combined value of lump sums the predecessor schools would have received. This will be $((£110,018 \times 2) \times 70\%) = £154,025$. This is an additional cost the Schools Block of £44k.

This is the maximum additional support that can / will be offered in 2019/20. In 2020/21, only split site funding will be available.

On this basis however, the school would receive in 2019/20 additional £82,000 to support its financial position and transition:

- Protected amalgamated lump sum at 70% (an additional £44k on the value of lump sum for a single school).
- Split site funding £28k.

For the Forum's reference, the school held a surplus revenue carry forward balance of £127k at March 2018 (5% of funding) and is forecasting, without additional lump sum support in 2019/20, that this balance will reduce to £22k (1% of funding at March 2021).

Recommended – The Schools Forum is asked to agree the application to the ESFA proposed for a 'disapplication' related to the lump sum allocated to Silsden Primary School in 2019/20 as set out in this report.