

## 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 2019/20 Academic Year.

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

The Financial Classification of Schools was last presented to the Schools Forum on 11 July 2018.

**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 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 its outturn from the previous financial year.

**Details of the Item for Consideration**

This information is presented annually to the Schools Forum and in the context of the information previously presented on school balances, the level financial challenge faced by schools and academies, and the liabilities that may crystallise with a school's conversion to academy status. The table below shows the initial calculation of number of maintained schools in each category in the 2019/20 Academic Year Financial Classification. This assumes that no further conversions of maintained schools to academy take place.

	<b>Category A</b>	<b>Category B</b>	<b>Category C</b>	<b>Category D</b>
<b>Nursery</b>	1	1	2	3
<b>Primary</b>	9	3	50	21
<b>Secondary</b>	3	1	1	1
<b>Special</b>	0	0	2	1
<b>PRUs</b>	3	0	1	2
<b>Total</b>	<b>16</b>	<b>5</b>	<b>56</b>	<b>28</b>

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 2<sup>nd</sup> or 3<sup>rd</sup> year budgets

Category D: Normal level of support

The table below shows the change in the number of schools in each category from the 2018/19 Academic Year Financial Classification (on an equivalent basis i.e. removing schools that have converted to academy).

	<b>Category A</b>	<b>Category B</b>	<b>Category C</b>	<b>Category D</b>
<b>Nursery</b>	+1	+1	+1	-3
<b>Primary</b>	-4	+1	+13	-10
<b>Secondary</b>	-1	+1	-1	+1
<b>Special</b>	0	0	-1	+1
<b>PRUs</b>	+3	-3	0	0
<b>Total</b>	<b>-1</b>	<b>0</b>	<b>+12</b>	<b>-11</b>

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

None

**Recommendations**

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

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

None

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

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