

SCHOOLS FORUM AGENDA ITEM

For Action



For Information

**Brief Description of Item**

Members are asked to agree newly proposed allocations to mainstream maintained secondary schools and mainstream secondary academies from the DSG Schools Block Growth Fund in 2020/21.

Date (s) of any Previous Discussion at the Forum

The criteria for funding expanding schools and bulge classes in 2020/21 were included as part of the consultation on Primary and Secondary funding in 2020/21, and were agreed by members prior to submission of our final Schools Block pro-forma to the ESFA in January 2020.

Background / Context

The School and Early Years Finance (England) Regulations 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 hard 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 2019, and were part of our final Schools Block APT (pro-forma) submitted to the ESFA in January 2020.

The agreed criteria and mechanisms for allocating growth funding to secondary schools / academies in 2020/21 are the same as in 2019/20 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 2020, 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 2020 Census).
- Funding is allocated 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.

Background / Context

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 2020, 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 2019 Census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers incorporating the school's October 2020 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 forecasts of September 2020 pupil numbers in the secondary phase and in the numbers of additional pupils that will be admitted, all Growth Fun allocations to secondary schools and academies (both new and existing expansions) for the 2020/21 year will be checked against actual October 2020 Census numbers before being confirmed.

In addition to the main Growth Fund, the Schools Forum has agreed a financial support model for Beckfoot Upper Heaton Academy and has made discrete budget provision within the Schools Block for this. Payments in respect of this model have already been made for 5 out of 7 years. 2020/21 is the 6th year of payment.

Details of the Item for Consideration

This paper asks Members to consider allocations from the main Secondary Growth Fund to fund **12** secondary schools and secondary academies that are expanding from / in September 2020 or have been asked to admit additional students above PAN for the 2020/21 academic year; the funding will support an increase in provision as follows.

- **Appleton Academy** (existing expansion) + 11 pupils at October 2020, resulting in an allocation of **£23,417** for the period September 2020 – March 2021 (total of £40,143 for the 2020/21 AY).
- **Bingley Grammar School** (bulge class intake) + 19 pupils at October 2020, resulting in an allocation of **£35,632** for the period September 2020 – March 2021 (maintained school).
- **Bradford Girls Grammar School** (existing expansion) + 21 pupils at October 2020, resulting in an allocation of **£39,383** for the period September 2020 – March 2021 (total of £67,513 for the 2020/21 AY).
- **Buttershaw Business & Enterprise College** (existing expansion) + 14 pupils at October 2020, resulting in an allocation of **£26,255** for the period September 2020 – March 2021 (total of £45,009 for the 2020/21 AY).
- **Carlton Bolling College** (existing expansion) + 87 pupils at October 2020, resulting in an allocation of **£185,206** for the period September 2020 – March 2021 (total of £317,496 for the 2020/21 AY).
- **Dixons City Academy** (new expansion) + 23 pupils at October 2020, resulting in an allocation of **£43,133** for the period September 2020 – March 2021 (total of £73,943 for the 2020/21 AY).
- **Dixons McMillan Academy** (new expansion) + 19 pupils at October 2020, resulting in an allocation of **£35,632** for the period September 2020 – March 2021 (total of £61,083 for the 2020/21 AY).
- **Dixons Trinity Academy** (new expansion) + 21 pupils at October 2020, resulting in an allocation of **£39,383** for the period September 2020 – March 2021 (total of £67,513 for the 2020/21 AY).
- **Ilkley Grammar School** (existing expansion) + 71 pupils at October 2020, resulting in an allocation of **£151,145** for the period September 2020 – March 2021 (total of £259,106 for the 2020/21 AY).

Details of the Item for Consideration Continued

- **Immanuel College** (existing expansion) + 40 pupils at October 2020, resulting in an allocation of **£75,015** for the period September 2020 – March 2021 (total of £128,597 for the 2020/21 AY).
- **Parkside School** (existing expansion) + 37 pupils at October 2020, resulting in an allocation of **£78,766** for the period September 2020 – March 2021 (maintained school).
- **Titus Salt School** (existing expansion) + 17 pupils at October 2020, resulting in an allocation of **£36,190** for the period September 2020 – March 2021 (maintained school).

The total of these 12 allocations is **£767,028**.

In addition for reference, using the agreed model, the payment for **Beckfoot Upper Heaton Academy** for 2020/21 is **£419,701**. This is based on an October 2020 Census number of 672 pupils (vs. 595 at October 2019). This payment is reduced from the £491,266 paid in respect of 2019/20. The £419,701 is slightly lower (-£7,299) than the £427,000 original estimate of the 2020/21 cost, which was made in setting the DSG planned budget. This allocation was agreed by the Forum at the planned budget stage in January 2020.

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

The Forum has set aside the following values of main Growth Fund from the 2020/21 Schools Block allocation for new expansions during 2020/21:

- Primary £200,000
- Secondary £800,000

In addition, the Forum carried forward from 2019/20 £427,578 of uncommitted general Growth Fund balance and £1,208,734 of budget provision for the agreed support model for Beckfoot Upper Heaton Academy.

The remaining balance of the £200,000 Primary phase Growth Fund, after the two allocations agreed by the Forum in September and October 2020, is £135,992. No further allocations to the primary phase are expected in 2020/21. Therefore, an under spend of £135,992 is expected to be carried forward into 2021/22.

The total cost of the 12 allocations set out above for the Secondary phase is £767,028 and so the Secondary phase Growth Fund is expected to under spend by £32,972 in 2020/21. No further allocations to the secondary phase are expected in 2020/21 and this balance is expected to be carried forward into 2021/22.

On this basis, the main 2020/21 Growth Fund will be under spent in total by £168,964, leaving a forecasted balance to carry forward into 2021/22 of £596,542.

The £419,701 allocated via the support model for Beckfoot Upper Heaton Academy in 2020/21 is met from the £1,208,734 discrete provision already made within the Growth Fund. A remaining provision of £789,033 for Beckfoot Upper Heaton Academy is carried forward into 2021/22. The cost of the final year of support is expected to be in the region of £430,000, meaning that £359,033 of balance will be added to the overall Growth Fund balance held within the Schools Block.

The total forecasted value of unspent Growth Fund balance to be carried forward into 2021/22 is £1,385,575.

Recommendations

- (1) **The Schools Forum is asked to agree to allocate a total of £767,028 from the main Secondary Growth Fund in 2020/21 to secondary phase schools and academies as set out in this report.**
- (2) **Members are asked to note that an indicative total sum of £1,385,575 of surplus balance Growth Fund is ring-fenced and is forecasted to be carried forward into 2021/22. The Schools Forum will be asked to consider the allocation and retention of this balance in support of Growth Fund costs in 2021/22 at the meeting 13 January.**

List of Supporting Appendices / Papers

None.

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