

SCHOOLS FORUM AGENDA ITEM

For Action



For Information

**Brief Description of Item**

Forum members are asked to agree newly proposed allocations, from the 2021/22 Schools Block Growth Fund, to maintained primary and secondary schools and to primary and secondary academies.

Date (s) of any Previous Discussion at the Forum

The criteria for funding expanding schools and bulge classes were included as part of the consultation on 2021/22 Primary and Secondary mainstream funding and were agreed by Forum members prior to submission of our final Schools Block pro-forma to the ESFA in January 2021.

Background / Context

The Schools 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:

- ring-fenced i.e. cannot be spent on any other purpose. Any unspent growth funding remaining at the financial 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 require that local authorities consult their Schools Forum before incurring any expenditure from the Growth Fund.

The criteria and mechanisms for allocating funding from the Growth Fund in Bradford in 2021/22 were agreed by Forum members following the consultation held in October - November 2020, and were part of our final Schools Block APT (pro-forma) submitted to the ESFA in January 2021.

Primary Phase Growth Fund Allocations Criteria 2021/22

The criteria and mechanisms agreed for allocating growth funding to primary schools and to primary academies in 2021/22 are the same as used in 2020/21 and are, in summary:

- Where a school / academy is expanding or is admitting a bulge class for the first time in September 2021, the school / academy is allocated 80% of the value of the 2021/22 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

Secondary Phase Growth Fund Allocations Criteria 2021/22

The criteria and mechanisms agreed for allocating growth funding to secondary schools and to secondary academies in 2021/22 are the same as used in 2020/21 and are, in summary:

For secondary schools / academies, that are 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 via 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 2021, 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 2021 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.

Funding for eligible secondary schools and secondary 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 2021, 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 2020 Census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers incorporating the school's October 2021 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 2021 pupil numbers in the secondary phase and in the numbers of additional pupils that will be admitted, all Growth Fund allocations to secondary schools and secondary academies (both new and existing expansions) for the 2021/22 year will be checked against actual October 2021 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 6 out of 7 years. 2021/22 is the 7th and final year of payment.

This report asks Forum members to consider allocations from the 2021/22 Schools Block Growth Fund, now proposed as follows.

Details of the Item for Consideration

Primary Phase

- **Addingham Primary School** – adjustment of agreed bulge class funding, now in year 4, calculated previously on estimated numbers; now re-calculated on actual numbers. Adjusted 2021/22 financial year allocation of + £21,418. Adjusted prior year allocation of + £42,522. Total adjustment of + **£63,940**.
- **Co-op Academy Princeville** – previously agreed half bulge class funding for a year 5 class, now moved to year 6 for the 2021/22 academic year. Funding is based on 8 pupils. Allocation of **£54,974**.

The total of these 2 allocations is **£118,914**.

Secondary Phase

- **Appleton Academy** (existing expansion) + 13 pupils at October 2021, resulting in an allocation of **£30,114** for the period September 2021 – March 2022 (total of £51,623 for the 2021/22 academic year).
- **Bingley Grammar School** (bulge class intake) + 28 pupils at October 2021, resulting in an allocation of **£64,860** for the period September 2021 – March 2022 (maintained school).
- **Bradford Girls Grammar School** (existing expansion) + 24 pupils at October 2021, resulting in an allocation of **£49,333** for the period September 2021 – March 2022 (total of £84,570 for the 2021/22 AY).
- **Buttershaw Business & Enterprise College** (existing expansion) + 36 pupils at October 2021, resulting in an allocation of **£73,999** for the period Sept 2021 – March 2022 (total of £126,855 for the 2021/22 AY).
- **Carlton Bolling College** (existing expansion) + 66 pupils at October 2021, resulting in an allocation of **£152,885** for the period September 2021 – March 2022 (total of £262,088 for the 2021/22 academic year).
- **Dixons City Academy** (existing expansion) + 14 pupils at Oct 2021, resulting in an allocation of **£28,777** for the period September 2021 – March 2022 (total of £49,333 for the 2021/22 academic year).
- **Dixons McMillan Academy** (existing expansion) **ESTIMATED** + 16 pupils at Oct 2021, resulting in an allocation of **£32,888** for the Sept 2021 – March 2022 (total of £56,380 for the 21/22 academic year).
- **Dixons Trinity Academy** (existing expansion) + 21 pupils at October 2021, resulting in an allocation of **£43,166** for the period September 2021 – March 2022 (total of £73,999 for the 2020/22 academic year).
- **Co-op Academy Grange** (bulge class intake) + 30 pupils at October 2021, resulting in an allocation of **£61,666** for the period September 2021 – March 2022 (total of £105,713 for the 2020/22 academic year).
- **Ilkley Grammar School** (existing expansion) + 47 pupils at October 2021, resulting in an allocation of **£108,873** for the period September 2021 – March 2022 (total of £186,639 for the 2021/22 academic year).
- **Immanuel College** (existing expansion) + 64 pupils at October 2021, resulting in an allocation of **£148,252** for the period September 2021 – March 2022 (total of £254,146 for the 2021/22 academic year).
- **Oasis Academy Lister Park** (bulge class intake) **ESTIMATED** + 15 pupils at Oct 2021, resulting in an allocation of **£30,833** for Sept 2021 – March 2022 (total of £52,856 for the 2021/22 academic year).
- **Parkside School** (existing expansion) + 40 pupils at October 2021, resulting in an allocation of **£92,657** for the period September 2021 – March 2022 (maintained school).
- **Trinity Academy Bradford** (bulge class intake) + 6 pupils at October 2021, resulting in an allocation of **£12,333** for the period September 2021 – March 2022 (total of £21,143 for the 2020/22 academic year).
- **Titus Salt School** (existing expansion) + 18 pupils at October 2021, resulting in an allocation of **£41,696** for the period September 2021 – March 2022 (maintained school).

The total value of these 15 allocations is **£972,332**. Please note that 2 of these allocations are currently estimated (as indicated), as the October Census numbers have not yet been released to the Authority by the ESFA. The updated spending reports to be presented to the Schools Forum on 12 January will confirm these.

In addition, for reference, using the previously agreed model, the payment for **Beckfoot Upper Heaton Academy** for 2021/22 is **£351,708**. This is based on an October 2021 Census number of 709 pupils (vs. 672 at October 2020). The £351,708 is under (-£78,292) the £430,000 original estimate of the 2021/22 cost used in the DSG planned budget. This is 7th and final allocation to Beckfoot Upper Heaton Academy via this model.

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

The Forum set aside from the 2021/22 Schools Block budget the following Growth Fund values to be available to be allocated in support of new growth and adjustments during 2021/22:

- Primary £175,000
- Secondary £952,000
- Total £1,127,000

In addition to the £1,172,000 taken from the 2021/22 Schools Block, the Forum carried forward from the 2020/21 financial year a figure of £955,575 of uncommitted general Growth Fund balance, plus £430,000 of balance committed specifically to the support model for Beckfoot Upper Heaton Academy. A total of £1,386,575 of Growth Fund balance therefore, was carried forward from 2020/21.

The balance remaining from the £175,000 Primary phase Growth Fund provision, after the two allocations presented in this report, is £56,086. No further allocations to the primary phase are expected in 2021/22. Therefore, an under-spend of £56,086 is expected to be carried forward into 2022/23.

The total cost of the 15 allocations set out above for the Secondary phase is £972,332 and so the Secondary phase Growth Fund provision is expected to slightly over spend by £20,332. No further allocations to the secondary phase are expected in 2021/22. However, the values of the 2 estimated allocations may adjust.

On this basis, in total, the 2021/22 Schools Block Growth Fund provision of £1,127,000 will be under spent by £35,754, creating an additional balance of £35,754 to carry forward into 2022/23.

The £351,708 allocated via the support model for Beckfoot Upper Heaton Academy in 2021/22 is met from the £430,000 balance carried forward from 2020/21. As this support model has now been completed, meaning that there are no more payments due, the remaining balance of £78,292 will be added to the main Growth Fund balance to carry forward into 2022/23.

This means that the total forecasted value of unspent Growth Fund balance to be carried forward into 2022/23 is £1,069,621 (£955,575 + £35,754 + £78,292). This balance is retained as ring-fenced sum held within the Schools Block.

Recommendations

- (1) The Schools Forum is asked to agree to allocate a total of £972,332 * from the Growth Fund in 2021/22 to maintained secondary schools and secondary academies, as set out in this report.**
- (2) The Schools Forum is asked to agree to allocate a total of £118,914 from the Growth Fund in 2021/22 to maintained primary schools and primary academies, as set out in this report.**
- (3) Members are asked to note that an indicative total sum of £1,069,621 * of surplus balance of Growth Fund is ring-fenced and is forecasted to be carried forward into 2022/23. The Schools Forum will be asked to consider the allocation and / or retention of this balance at the meeting on 12 January.**

* Please note that 2 of the secondary-phase allocations are currently estimated (as indicated), as the October Census numbers have not yet been released to the Authority by the ESFA. The updated spending reports to be presented to the Schools Forum on 12 January will confirm these allocations and the total Growth Fund spend and balance to be carried forward.

List of Supporting Appendices / Papers

None.

Contact Officer (name, telephone number and email address)

Jonty Holden, Principal Finance Officer (Schools)
01274 431927
jonty.holden@bradford.gov.uk