

SCHOOLS FORUM AGENDA ITEM

For Action



For Information



Brief Description of Item

Forum members are asked to agree newly proposed allocations, from the 2023/24 Schools Block Growth Fund, to maintained secondary schools and to 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 2023/24 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 2023.

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 2023/24 were agreed by Forum members following the consultation held in October - November 2022, and were part of our final Schools Block APT (pro-forma) submitted to the ESFA in January 2023.

Primary Phase Growth Fund Allocations Criteria 2023/24

The criteria and mechanisms agreed for allocating growth funding to primary schools and to primary academies in 2023/24 are the same as used in 2022/23 and are, in summary:

- Where a school / academy is expanding or is admitting a bulge class for the first time in September 2023, the school / academy is allocated 80% of the value of the 2023/24 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 2023/24

The criteria and mechanisms agreed for allocating growth funding to secondary schools and to secondary academies in 2023/24 are the same as used in 2022/23 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 2023, 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 2023 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 2023, 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 2022 Census pupil numbers and a calculation of the composite 5/12 + 7/12 numbers incorporating the school's October 2023 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 2023 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 2023/24 year will be checked against actual October 2023 Census numbers before being confirmed.

This report asks Forum members to consider allocations from the 2023/24 Schools Block Growth Fund, now proposed as follows.

Please note that there are no proposed allocations to the primary phase.

Details of the Item for Consideration

- **Appleton Academy** (bulge class intake) ESTIMATED +30 pupils at Oct 2023, resulting in an allocation of **£67,001** for the period Sept 2023 – March 2024 (total of £114,858 for the 2023/24 academic year). *
- **Bingley Grammar School** (bulge class intake) +30 pupils at Oct 2023, resulting in an allocation of **£75,514** for the period Sept 2023 – March 2024 (maintained school).
- **Bradford Girls Grammar School** (existing expansion) +29 pupils at Oct 2023, resulting in an allocation of **£72,997** for the period Sept 2023 – March 2024 (total of £125,138 for the 2023/24 AY).
- **Carlton Bolling College** (bulge class intake) +33 pupils at Oct 2023, resulting in an allocation of **£73,701** for the period Sept 2023 – March 2024 (total of £126,344 for the 2023/24 AY).
- **Carlton Keighley** (bulge class intake) +30 pupils at Oct 2023, resulting in an allocation of **£67,001** for the period Sept 2023 – March 2024 (total of £114,858 for the 2023/24 AY).
- **Dixons Allerton Academy** (bulge class intake) +5 pupils at Oct 2023, resulting in an allocation of **£11,167** for the period Sept 2023 – March 2024 (total of £19,143 for the 2023/24 AY).
- **Dixons City Academy** (existing expansion) +20 pupils at Oct 2023, resulting in an allocation of **£50,343** for the period Sept 2023 – March 2024 (total of £86,302 for the 2023/24 academic year).
- **Dixons McMillan Academy** (existing expansion) ESTIMATED +14 pupils at Oct 2023, resulting in an allocation of **£35,240** for the Sept 2023 – March 2024 (total of £60,411 for the 2022/24 academic year). *
- **Dixons Trinity Academy** (existing expansion) +24 pupils at Oct 2023, resulting in an allocation of **£60,411** for the period Sept 2023 – March 2024 (total of £103,562 for the 2023/24 academic year).
- **Feversham College** (bulge class intake) ESTIMATED +15 pupils at Oct 2023, resulting in an allocation of **£33,500** for the period Sept 2023 – March 2024 (total of £57,429 for the 2023/24 academic year). *
- **Co-op Academy Grange** (bulge class intake) ESTIMATED +20 pupils at Oct 2023, resulting in an allocation of **£44,667** for the period Sept 23 – March 24 (total of £76,572 for the 2023/24 academic year). *
- **Ilkley Grammar School** (existing expansion) +25 pupils at Oct 2023, resulting in an allocation of **£62,928** for the period Sept 2023 – March 2024 (total of £107,877 for the 2023/24 academic year).
- **Immanuel College** (existing expansion) +17 pupils at Oct 2023, resulting in an allocation of **£42,791** for the period Sept 2023 – March 2024 (total of £73,357 for the 2023/24 academic year).
- **Oasis Lister Park** (bulge class intake) +20 pupils at Oct 2023, resulting in an allocation of **£44,667** for the period Sept 2023 – March 2024 (total of £76,572 for the 2023/24 AY).
- **Parkside School** (bulge class intake) ESTIMATED +12 pupils at Oct 2023, resulting in an allocation of **£26,800** for the period Sept 2023 – March 2024 (total of £45,943 for the 2023/24 academic year). *
- **Trinity Academy Bradford** (bulge class intake) ESTIMATED +18 pupils at Oct 2023, resulting in an allocation of **£40,200** for the period Sept 23 – March 24 (total of £68,915 for the 2023/24 academic year). *

The total value of these 16 allocations is **£808,929**. Please note that 6 of these are currently estimated (as indicated), as the October Census numbers have not yet been released by the ESFA. The updated spending reports to be presented to the Schools Forum on 10 January will confirm these allocations.

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

The Forum set aside from the 2023/24 Schools Block budget the following Growth Fund values to be available to be allocated in support of new growth and adjustments during 2023/24:

- Primary £0
- Secondary £600,000

In addition to the £600,000 taken from the 2023/24 Schools Block, the Forum carried forward from the 2022/23 financial year a figure of £1,319,606 of uncommitted Growth Fund balance. The total cost of the 16 allocations set out above for the Secondary phase is £808,929 and so the Secondary phase Growth Fund provision is estimated to overspend by £208,929. No further allocations to the secondary phase are expected in 2023/24. However, the values of the 6 estimated allocations may adjust. On this basis, in total, the total current estimated value of unspent Growth Fund balance to be carried forward into 2024/25 is £1,110,677. 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 £808,929 from the Growth Fund in 2023/24 to maintained secondary schools and secondary academies, as set out in this report. ***
- (2) Members are asked to note that an estimated total sum of £1,110,677 of surplus balance of Growth Fund is ring-fenced and is forecasted to be carried forward into 2024/25. * The Schools Forum will be asked to consider the allocation and / or retention of this balance at the meeting on 10 January.**

* Please note that 6 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 10 January will confirm these allocations and the total Growth Fund spend and balance to be carried forward.

List of Supporting Appendices / Papers

None.

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