

BURY SCHOOLS' FORUM - AGENDA



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To: All Members of Bury Schools' Forum

Dear Member

Bury Schools' Forum

You are invited to attend a meeting of the Bury Schools' Forum which will be held as follows:-

Date:	Thursday, 5 January 2023
Place:	Microsoft Teams Meeting
Time:	4.00 pm

BURY SCHOOLS FORUM – AGENDA
Thursday 5 January 2023 at 4.00pm
Location: Microsoft Teams

1 APOLOGIES FOR ABSENCE

2 SCHOOLS FUNDING FORMULA *(Pages 3 - 10)*

Paper attached

3 DATE AND TIME OF NEXT MEETING

The next meeting of the Schools' Forum will be on Tuesday 17 January 2023 at 4pm via Microsoft Teams.

Schools and Academies Funding 2023-24

1. Dedicated Schools Grant 2023-24

Following the publication of the Dedicated Schools Grant (DSG) allocations on 16 December 2022, which takes into account the fully validated October 2022 pupil census, the 2022-23 DSG for Bury is summarised in the table below.

* Please note that the 2022-23 baseline shown below includes the Supplementary Grant in the Schools Block and additional DSG in the High Needs Block. This is for the purpose of demonstrating the actual variance as these have been incorporated into the 2023-24 DSG.

2023 to 2024 DSG allocations, before recoupment and deductions for national non-domestic rates, and for direct funding of high needs places by Education and Skills Funding Agency (ESFA)						
Dedicated schools grant (DSG):		Schools block	Central school services block	High needs block	Early years block	Total DSG allocation
351	BURY	(£s)	(£s)	(£s)	(£s)	(£s)
	2022-23 including additional grant*	147,202,228	990,900	40,929,921	13,486,130	202,609,179
	2023-24	149,832,168	1,037,945	45,008,687	14,552,202	210,431,002
	Variance to 2022-23 £	2,629,940	47,045	4,078,766	1,066,072	7,821,823
	Variance to 2022-23 %	1.8%	4.7%	10.0%	7.9%	3.9%
Plus	Mainstream Schools Additional Grant (indicative)	5,118,450	0	0	0	5,118,450
	TOTAL 2023-24	154,950,618	1,037,945	45,008,687	14,552,202	215,549,452
	Variance to 2022-23 £	7,748,390	47,045	4,078,766	1,066,072	12,940,273
	Variance to 2022-23 %	5.3%	4.7%	10.0%	7.9%	6.4%

2 Schools Block

2a Formula Unit Values

Schools' Forum is required annually to recommend the formula unit values to be applied to all Mainstream Schools & Academies funding allocations.

The formula unit values applied to Bury Schools and Academies funding formula already directly mirror the DfE National Funding Formula (NFF) unit values. For information the Unit Values applicable to 2023-24 are as follows:

Factor	Sub-level	2022-23 NFF Values	2023-24 NFF Values	Variance £	Variance %
Basic Entitlement Age Weighted Pupil Unit (AWPU)	Primary	£3,217	£3,394	£177	5.5%
	Key Stage 3	£4,536	£4,785	£249	5.5%
	Key Stage 4	£5,112	£5,393	£281	5.5%
Deprivation Factors					
Free School Meals	Primary	£470	£480	£10	2.1%
	Secondary	£470	£480	£10	2.1%
Free School Meals - Ever 6	Primary	£590	£705	£115	19.5%
	Secondary	£865	£1,030	£165	19.1%
Income Deprivation Affecting Children Indices (IDACI) Primary	IDACI F	£220	£230	£10	4.5%
	IDACI E	£270	£280	£10	3.7%
	IDACI D	£420	£440	£20	4.8%
	IDACI C	£460	£480	£20	4.3%
	IDACI B	£490	£510	£20	4.1%
	IDACI A	£640	£670	£30	4.7%
Income Deprivation Affecting Children Indices (IDACI) Secondary	IDACI F	£320	£335	£15	4.7%
	IDACI E	£425	£445	£20	4.7%
	IDACI D	£595	£620	£25	4.2%
	IDACI C	£650	£680	£30	4.6%
	IDACI B	£700	£730	£30	4.3%
	IDACI A	£890	£930	£40	4.5%
Additional Educational Needs Factors					
English as an Additional Language (EAL)	Primary	£565	£580	£15	2.7%
	Secondary	£1,530	£1,565	£35	2.3%
Low Prior Attainment	Primary	£1,130	£1,155	£25	2.2%
	Secondary	£1,710	£1,750	£40	2.3%
Mobility	Primary	£925	£945	£20	2.2%
	Secondary	£1,330	£1,360	£30	2.3%
School Factors					
Lump Sum	Primary	£121,300	£128,000	£6,700	5.5%
	Secondary	£121,300	£128,000	£6,700	5.5%
Minimum per pupil funding levels	Primary	£4,265	£4,405	£140	3.3%
	Secondary	£5,525	£5,715	£190	3.4%

The application of the NFF unit values across the above factors results in the allocations shown in the table below. Increased allocations across the Deprivation Factors results in a reduction in the amount required to meet the Minimum Funding Level and the Minimum Funding Guarantee. The amount of funding distributed to schools, including the centralised Rates payments, equates to 99.65% of the Schools Block Funding. The effect of pupil number variances between the October funding census collections for 2021 and 2022 needs to be noted in respect to the impact on the figures included in the table below.

Primary schools have seen an overall net reduction of 125 pupils.
Secondary schools have seen an overall net increase of 7 pupils.

For both sectors Forum will be aware that there will be individual schools with reductions whereas others with gains to pupil numbers included in the overall net variances that they will all need to plan for financially in order to sustain their balanced budget positions.

Factor	Sub-level	2022-23	2023-24	Variance £	Variance %
Basic Entitlement Age Weighted Pupil Unit (AWPU)	Primary	£52,031,758	£54,473,700	£2,441,942	4.7%
	Key Stage 3	£31,126,032	£32,619,345	£1,493,313	4.8%
	Key Stage 4	£22,804,632	£24,338,609	£1,533,977	6.7%
Deprivation Factors					
Free School Meals	Primary	£1,657,187	£1,695,705	£38,518	2.3%
	Secondary	£1,140,220	£1,288,800	£148,580	13.0%
Free School Meals - Ever 6	Primary	£2,187,856	£2,552,705	£364,849	16.7%
	Secondary	£2,517,150	£3,100,300	£583,150	23.2%
Income Deprivation Affecting Children Indices (IDACI) Primary	IDACI F	£316,160	£328,298	£12,138	3.8%
	IDACI E	£729,712	£762,983	£33,271	4.6%
	IDACI D	£437,025	£440,552	£3,527	0.8%
	IDACI C	£805,309	£835,789	£30,479	3.8%
	IDACI B	£294,557	£311,831	£17,274	5.9%
	IDACI A	£316,611	£318,111	£1,500	0.5%
Income Deprivation Affecting Children Indices (IDACI) Secondary	IDACI F	£321,247	£334,363	£13,117	4.1%
	IDACI E	£815,111	£841,879	£26,768	3.3%
	IDACI D	£413,426	£438,646	£25,220	6.1%
	IDACI C	£780,729	£856,348	£75,620	9.7%
	IDACI B	£323,191	£347,208	£24,017	7.4%
	IDACI A	£337,780	£349,188	£11,407	3.4%
Additional Educational Needs Factors					
English as an Additional Language (EAL)	Primary	£906,745	£941,927	£35,182	3.9%
	Secondary	£397,737	£437,476	£39,739	10.0%
Low Prior Attainment	Primary	£5,343,280	£5,577,065	£233,785	4.4%
	Secondary	£4,296,116	£4,380,502	£84,386	2.0%
Mobility	Primary	£87,649	£89,607	£1,958	2.2%
	Secondary	£0	£22,767	£22,767	100.0%
School Factors					
Lump Sum	Primary	£7,763,200	£8,192,000	£428,800	5.5%
	Secondary	£1,576,900	£1,664,000	£87,100	5.5%
Total Allocated via NFF		£139,727,319	£147,539,704	£7,812,385	5.6%
Other Factors					
Rates adj 2021-22		£44,161	£0	-\$44,161	-100.0%
Rates		£1,248,874	£1,188,224	-\$60,650	-4.9%
Minimum Funding Level		£1,059,787	£488,365	-\$571,422	-53.9%
Minimum Funding Guarantee		£173,793	£94,807	-\$78,986	-45.4%
Growth fund		£72,181	£0	-\$72,181	-100.0%
Available for transfer to High Needs Block		£715,200	£521,068	-\$194,132	-27.1%
TOTAL		£143,041,316	£149,832,168	£6,790,852	4.7%

2b Mainstream Schools additional grant

The 2022 Autumn Statement announced that the core schools’ budget will increase by £2 billion in the 2023-24 financial year, over and above totals announced at the Spending Review 2021.

In the 2023-24 financial year, mainstream schools will be allocated this additional funding through the mainstream schools additional grant (MSAG) 2023-24. This is in addition to schools’ allocations through the schools national funding formula.

From 2024-25 onwards, the intention is that this funding will be incorporated into core budget allocations in the Schools Block of the DSG.

For Mainstream Schools and Academies, the 2023-24 indicative allocation for Bury is £5,118,450. School-level allocations will be published in May 2023.

The funding rates consist of the following 3 elements, which are based on factors already in the schools national funding formula:

- a basic per-pupil rate (with different rates for primary, key stage 3 and key stage 4)
- a lump sum paid to all schools, regardless of pupil numbers
- a per-pupil rate for pupils who are recorded as having been eligible for free school meals at any point in the last six years (FSM6), with different rates for primary and secondary pupils

Grant will be calculated by multiplying the relevant funding rates using data from the October 2022 census. The Area Cost Adjustment (ACA) will then be applied.

Factor	Unit Value
Per pupil Primary	£119
Per pupil Secondary KS3	£168
Per pupil Secondary KS4	£190
Lump Sum Primary & Secondary	£4,510
Per eligible FSM6 Primary	£104
Per eligible FSM6 Secondary	£152
Area Cost Adjustment	1.00547

2c De-Delegation

Schools’ Forum (Maintained Mainstream only) is required to recommend the De-delegated items each year.

In 2022, the outcomes of the DfE consultation on the funding of Local Authority School Improvement Functions were published. In summary, the conclusions were:

- *we (DfE) will proceed with reducing the local authority school improvement monitoring and brokering grant by 50% for financial year 2022 to 2023, prior to full removal in financial year 2023 to 2024*
- *provision will be included in the School and Early Years Finance Regulations 2022 (England) to instead allow local authorities to deduct funding for local authorities’ core school improvement activities from maintained school budgets*
- *We (DfE) will reserve the right to permit de-delegation against the wishes of a schools forum in order to ensure councils are in sufficient funds to deliver their core school improvement activities*

In 2022-23, the DfE grant was reduced by 50% and Forum agreed to de-delegate £7.50 per pupil.

In 2023-24, following removal of the remaining grant, the proposal is to increase the de-delegated rate to £15.00 per pupil. The remaining de-delegated values have remained at the same rate for a number of years, therefore a small inflationary increase is included in the proposed values for 2023-24.

	Schools of Concern	FSM Benefits checking	Trade Union Facilities Time	Local Authority School Improvement
	Per pupil	Per FSM6	Per pupil	Per pupil
2022-23	£6.00	£5.00	£4.00	£7.50
Proposed 2023-24	£6.30	£5.25	£4.20	£15.00

RECOMMENDATION 1:

Bury’s Schools’ Forum (Maintained School representatives) recommend the De-delegated values for 2023-24, summarised as follows:

- Schools of Concern @ £6.30 per pupil
- Free School Meals Eligibility Checking @ £5.25 per FSM6
- Trade Union Facilities Time @ £4.20 per pupil
- School Improvement Brokerage and Monitoring Grant @ £15.00 per-pupil

2d Schools Block Transfer to High Needs Block

Following receipt of the DSG funding settlement, validated October 2022 census data, and after updating all Mainstream Schools & Academies 2023-24 funding formula in accordance with the recommended National Funding Formula (NFF) requirements, Schools' Forum are requested to consider and recommend a transfer of available funds from the Schools Block to the High Needs Block DSG.

This transfer effectively recognises an essential contribution from Schools and Academies towards helping with the overall cost pressures being faced by the High Needs Block which funds all Special Educational Needs and/or Disabilities (SEND) provision for all children and young people aged 0-25 whether with an Education Health and Care Plan (EHCP) or not in Early Years, Mainstream, Specialist, Maintained or Independent provisions in or out of Borough.

Schools' Forums are permitted, in accordance with the statutory funding regulations and Operational Guidance, to recommend a transfer up to 0.5% of the Schools Block without requiring the sanction of the Secretary of State.

As the distribution of funding to schools equates to 99.65% of the total, only 0.35% remains available for transfer to the High Needs Block. This equates to £521,068.

After completing all formula aspects and applying the recommendations of Schools' Forum as outlined in this paper, the Local Authority is proposing that a transfer of 0.35% is recommended by Bury's Schools' Forum on the basis of:

- The Mainstream funding formula and unit values have been applied 100% to all individual schools and academies in accordance with the 2023-24 National Funding Formula (NFF) unit values which has meant a £7.8m increase in funding.
- The 100% application of National Funding Formula unit values confirms the proposed transfer does not result in any funding reductions, or cuts, to any individual school or academy budget allocation for 2023-24;
- The transfer does not impact whatsoever on the Mainstream Schools Additional Grant provided for 2023-24;
- The transfer of £521,068 will significantly support the significant SEND transformation requirements and funding of all aspects within the High Needs block, it will not be designated to any one individual item. The priorities include revenue investment into new or expanded Resourced Provision within Mainstream school and academy settings which will contribute to the overall capacity and sufficiency of in-Borough provision and help deliver the strategy around reducing the requirement for Out of Borough placements.
- Without this support from Forum the deficit recovery faces significant increased risk of not being achieved as required by the DfE formal agreement which will result in the balance of the additional £20m Safety Valve DSG being withdrawn and further interventions imposed by the DfE.
- The Safety Valve DSG deficit reduction plan includes a 0.5% school block transfer within the projections. However to ensure that Bury schools receive the

additional monies in line with the national funding formula and being cognizant of the pressures on schools budgets the proposal has been reduced from the maximum allowed, 0.5% to 0.35%.

RECOMMENDATION 2:

Bury's Schools' Forum recommend the permitted transfer of 0.35% of the Schools Block to the High Needs Block for 2023-24.

3. Central Schools Services Block (CSSB)

Schools' Forum is required to approve the allocation of budgets included under the CSSB, which was created several years ago in place of the former Education Services Grant (ESG) retained functions funding for Local Authorities. The former ESG funding was added to the DSG in April 2018 in order to help sustain the services that it is intended to support.

The amount of grant in 2034-24 has increased by 4.7%. However, the centralised National Copyright Licences costs will increase by 10.7%. The remaining funding has been allocated across all headings below as a percentage increase.

Central Schools Services Block (CSSB)	2022-23	2023-24	Variance £	Variance %
Section 251 – Central Provision				
1.4.1 Combined Budgets Historical Commitment – Safeguarding in Schools Officer	£48,000	£49,800	£1,800	3.8%
1.4.2 Admissions	£198,500	£205,800	£7,300	3.7%
1.4.3 Schools' Forum	£17,000	£17,600	£600	3.5%
1.4.14 National Copyright Licences	£152,500	£168,800	£16,300	10.7%
Section 251 - Former ESG Services				
1.5.1 Education Welfare	£268,700	£278,600	£9,900	3.7%
1.5.2 Asset Management	£92,700	£96,100	£3,400	3.7%
1.5.3 Statutory / Regulatory inc SACRE	£65,000	£67,400	£2,400	3.7%
Other				
Teachers Pay and Pension Grant	£148,500	£153,845	£5,345	3.6%
Total Central School Services Block (CSSB)	£990,900	£1,037,945	£47,045	4.7%

RECOMMENDATION 3:

Bury's Schools' Forum recommend the allocation of CSSB budgets as outlined to the applicable services for 2023-24.

4. High Needs Block

High needs funding is provided to local authorities through the high needs block of the DSG, enabling them to meet their statutory duties under the Children and Families Act 2014.

The actual overall increase to Bury's High Needs Block funding for 2023-24 is £4,078,766 (10%).

Further updates on the High Needs position will be brought to future Schools' Forum meetings, including detailed monitoring reports on the delivery of the Safety Valve agreement.

5. Early Years Block

Updates and recommendations for the 2023-24 Early Years funding rates will be brought to the next Schools' Forum meeting.

6. Business Rates

For information, Bury has already adopted the new Central Payments system for School Business Rates. The 2023-24 formula budgets will include an estimated Rates figure for information purposes only and will not be directly allocated to schools delegated budgets.

Schools and academies will need to be aware that their budget notifications will include the Business Rates estimate plus a corresponding deduction.

7. Pupil Premium Grant (PPG)

School PPG allocations are now aligned to the annual October census used for main school funding purposes.

LAC PPG is still determined using the Local Authority Looked After Children return (SSDA903) as at 31 March each year. This element of the PPG is managed by the Virtual School.

This means that schools may see an in-year reduction in their 2023-24 FSM PPG allocation if a pupil is subsequently identified as LAC on the March 2023 data return.

Factor	2022-23 Unit Value	2023-24 Unit Value	Variance £	Variance %
Primary FSM	£1,385	£1,455	£70	5.1%
Secondary FSM	£985	£1,035	£50	5.1%
Looked After Children (LAC)	£2,410	£2,530	£120	5.0%
Post LAC	£2,410	£2,530	£120	5.0%
Service	£320	£335	£15	4.7%

Funding update prepared by
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