

**AGENDA FOR
BURY SCHOOLS' FORUM**



Contact: Andrea Tomlinson
Direct Line: 01612535133
E-mail: a.j.tomlinson@bury.gov.uk
Web Site: www.bury.gov.uk

To: All Members of Bury Schools' Forum

Dear Member/Colleague

Bury Schools' Forum

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

Date:	Tuesday, 14 January 2025
Place:	Microsoft Teams Meeting
Time:	4.00 pm
Briefing Facilities:	If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted.
Notes:	

AGENDA

1 APOLOGIES FOR ABSENCE

2 MINUTES OF THE LAST MEETING *(Pages 3 - 8)*

The Minutes of the meeting held on 2 December 2024 are attached.

3 MATTERS ARISING

4 SCHOOLS & ACADEMIES FUNDING 2025 - 26 *(Pages 9 - 16)*

- a) Dedicated Schools Grant 2025 - 2026
- b) Schools Block
- c) Central School Services Block
- d) High Needs Block
- e) Early Years Block

Report attached

5 HIGH NEEDS BUDGET REPORT *(Pages 17 - 26)*

Report attached

**Bury Schools Forum
Monday 2 December 2024
Microsoft Teams**

Attendance**Early Years**

None in Attendance

Maintained PrimaryRichard Ainsworth
Simon WaddingtonGovernor (Plus Governors Forum)
Headteacher – Hollins Grundy Primary**Maintained Secondary**

None in Attendance

Academy

None in Attendance

Academy Primary

None in attendance

Academy Secondary

Orienne Langley-Sadler

Oak Learning Partnership - Elms Bank

Special

Joanne Hurst

Millwood Special School (S)

Pupil Referral Unit

None in Attendance

Non-Schools SectorJoanne Burns
Helena ThomNASUWT
NEU**16 – 19 Education Representative**

Carinna Vitti

Holy Cross College

Children's Services DepartmentPhilip Herd
Stephen Holden
Elissa Reeve
Alison VidlerFinance Business Partner
Interim Director of Education and Skills
Senior Finance Analyst - Safety Valve
Principal Finance Officer (Schools & Systems Finance)**Observer(s)**

None in Attendance

1. **APOLOGIES FOR ABSENCE**

Rachel O'Neil
Rachel Pars

Hoyle Nursery
Bury College Education Trust

2 **MINUTES OF THE LAST MEETING**

It was agreed:

That the Minutes of the meeting held on 18 June 2024 be approved as a correct record of the meeting.

3 **MATTERS ARISING**

Richard Ashworth referred to the membership of the Forum and asked for an update. It was advised that the membership was reviewed during the summer term each year and any vacancies were hoped to be filled at that time.

Stephen Holden advised that he would be contacting headteachers to discuss the possibility of filling both headteacher and governor vacancies within the membership.

4 **NATIONAL FUNDING AND BURY'S FORMULA**

Alison Vidler presented the Schools and Academies Funding Update 2025-26

1. Indicative Dedicated Schools Grant (DSG) 2025-26

It was explained that due to the change of Government in July 2024, information that is usually issued to Local Authorities in the Summer had not yet been received. The DfE issued a brief

Summary Policy Statement in October. National Funding Formula information, along with Operational Guidance for 2025-26, was due to be issued at the end of November and Dedicated Schools Grant allocations are due to be issued during the last week of the Autumn Term.

1a. Schools Block

It was reported that in 2024-25 schools received additional funding through separate grants, in addition to the Dedicated Schools Grant (DSG):

Core Schools Budget Grant (CSBG);
Teachers' Pay Additional Grant (TPAG);
Teachers' Pension Employer Contribution Grant (TPECG).

The funding for these additional grants will be added to the baseline funding for 2025-26. Initial estimates indicate a per pupil increase of 8% when compared with 2024-25. However, once the baseline is adjusted for the rolling-in of separate grants, the increase is around 0.6%.

Final DSG allocations will be based on October 2024 pupil census data. Provisional census data demonstrates a decline in pupil numbers in Bury Primary Schools, which will have an impact on the overall funding and on individual schools and was set out within the report.

The DfE have given a commitment to providing additional funding to local authorities, schools and colleges for the increase in Employer National Insurance costs in 2025-26 with details to follow. At this stage a commitment has not been made to provide

separate grant funding for the cost of the 2025 Teachers' Pay Award.
As previously announced, the 'reception uplift' will be removed in 2025-26.

The minimum funding guarantee (MFG) is a protection against changes in per pupil school budget share (SBS) funding between the 2024-25 and 2025-26. The amount of protection will vary according to the impact of local changes in the funding formula and the effect of these on individual per pupil rates.

In 2025-26, local authorities have the flexibility to set local MFG between minus 0.5% and 0% compared to the baseline. The baseline will include funding in respect of the additional grants. The annualised CSBG rates in the baseline means that the baseline itself will include a funding uplift compared to 2024-25.

1b. High Needs Block

The indication is that all local authorities should receive a funding increase of at least 7% per head of the age 2 to 18 projected population. The MFG for special schools in 2025-26 will be 0%. The 2024-25 teachers' pay, pensions and core schools budget grants will not be incorporated into DSG funding for Special Schools in 2025-26. Instead, they will be combined into a single CSBG for special schools and alternative provision for 2025-26.

1c. Central Schools Services Block

The 2024-25 teachers' pensions and core schools budget grants will be rolled into the 2025-26 CSSB. This will be added to each local authority's baseline Funding for historic commitments continues to be subject to a year-on-year reduction. Additional funding will be allocated for increases in copyright licence costs.

1d. Early Years Block

Early Years funding allocations are subject to future announcements. Additional funding has been provided through the Early Years Budget Grant to cover the period September 2024 to March 2025. This additional funding will be incorporated into the DSG allocation for 2025-26.

2 Formula Unit Values

It was reported that the Schools' Forum is required to recommend the formula unit values to be applied to all Mainstream Schools & Academies funding allocations on an annual basis. The formula unit values applied to Bury Schools and Academies funding formula already directly mirror the DfE National Funding Formula (NFF) unit values.

The provisional NFF Unit Values applicable to 2025-26 were set out within the report.

Decision:

Bury's Schools' Forum recommends all the unit values specified in the table provided, to be applied in compliance with the National Funding Formula (NFF) to Bury's Mainstream schools and academies funding formula for 2025-26.

The formula mechanism contains options for schools to choose to de-delegate an amount from their formula allocation to contribute to Local Authority services that work to support them. Academies can buy back into Free School Meals Benefit Checking and Trade Union Facilities Time.

Decision:

Schools' Forum (maintained school representatives) recommends the de-delegated values for 2025-26, summarised as follows:

- Schools of Concern @ £6.88 per pupil
- Free School Meals Eligibility Checking @ £5.73 per FSM6
- Trade Union Facilities Time @ £4.59 per pupil
- School Improvement Brokerage and Monitoring Grant @ £16.38 per-pupil.

4. Minimum Funding Guarantee (MFG)

The statutory guidance allows local authorities to set a pre-16 MFG in their local formulae, to protect schools from excessive year-on-year changes.

For 2025-26 Local authorities will be able to set an MFG between minus 0.5% and +0.0% per pupil.

Decision:

Schools' Forum recommends that the MFG protection is set at +0.0% in line with DfE guidance.

4. Headroom

After all formula factors have been updated as per the above recommendations and in accordance with the National Funding Formula unit values, there should be a balance of DSG Schools Block that remains unallocated. This balance is required to cover any outstanding updates to budget determinations as follows:

- October 2024 census variations – Pupil numbers will be adjusted for in the final Schools Block determination, however any increases in funding required due to variances in pupil cohort characteristics need to be covered from any available headroom monies, for example if increased deprivation funding is required once all up-to-date pupils have been mapped into the respective factors.
- Growth – where schools meet the criteria agreed by Schools Forum in 2023 for Local Authority approved bulge classes.
- Falling Rolls Fund – funding may be set aside from the Schools Block to create a small fund to support good schools with falling rolls, where local planning data shows that the surplus places will be needed within the next three financial years. This is unlikely to be needed.
- Minimum per pupil funding Level (MFL) and Minimum Funding Guarantee (MFG) protections – once all final data has been input there may be increased protections required on individual school budgets to ensure their actual budget allocations comply with the MFL and MFG funding per-pupil levels and protections.

If, when all items above have been updated to reflect the actual individual schools budget determinations, and any amounts to support growth and falling rolls have been allocated, there remains a balance of unallocated Schools Block funding, the Local Authority will factor a transfer of this balance by way of supporting the deficit recovery to the High Needs Block.

Schools' Forum may recommend up to 0.5% transfer of Schools' Block without any disapplication process being required to be approved by the Secretary of State for Education.

A 0.5% transfer to the High Needs Block has been factored into future years as part of DSG Safety Valve Management Plan submitted to the DfE.

If there is insufficient Headroom once all other updates have been completed, then

Schools Forum may need to consider how to balance the overall Schools Block by reviewing all formula factors.

Decision:

Schools' Forum recommends the use of Headroom to address all outstanding items outlined above and a transfer of any balance, up to a maximum of 0.5%, of unallocated Schools Block Headroom to the High Needs Block, the amount to be confirmed at the meeting of Schools' Forum in January 2025.

5 SCHOOLS WITH EXCESS SURPLUS BALANCES 2023-24

Alison Vidler presented a report setting out the excess surplus balances at the end of the 2023 – 24

The schools set out had excess surplus balances at the end of the 2023-24 financial year. Following a review of the 2024-25 budget plan for each school, it was found that the excess surplus had been committed to costs in the 2024-25 budget plan in all but one school.

Cloughside – 45,171

It was explained that Cloughside were seeking to establish outreach support 'Cloughside in the Community'.

The School's Forum were asked to:

- a) Recommend that the Executive Director of Children and Young People recovers the amount shown in final column of the table above;

Or

- b) As Cloughside is seeking to establish outreach support, 'Cloughside in the Community', allow the school to retain the excess surplus to fund this new provision.

Decision:

The Schools' Forum agree that Cloughside retain the excess surplus to fund the new provision.

6 PUPIL REFERALL UNIT (PRU) – REVISED FUNDING ARRANGEMENTS

Phil Herd presented a report seeking approval from the Schools' Forum for the recommended revised funding arrangements for the PRU.

It was explained that the current funding arrangements for the PRU are that 136 places are paid at £10,000 plus historic TPPG (Teacher Pay & Pension Grant) at £660. The additional top up funding of £8,590 is funded based upon occupancy. Totalling £19,250 per occupied Permanently Excluded (PEX) place per annum.

The PRU also take EHCP students for which there are not sufficient special school places in Bury. EHCP pupils are funded via the Bury Special School Banding Model.

The split of places is 90 permanent exclusion places (PEX) and 46 EHCP places.

Spring Lane is experiencing increasing challenges in behaviour and the level of PEX top up funding and lack of guaranteed level of funding is not sufficient to meet the needs of the cohort.

There are also issues with buildings meaning increasing demand for expensive AP packages which are putting some pressure on the PSV .

Proposal

The proposal is that the top up funding is increased to £10,250 and that 90% (81 number) of the PEX places are guaranteed. In practice this 90% should always be achieved but it reduces bureaucracy in that currently funding is allocated every time a pupil is admitted.

The £10,250 is comparable to other GM LA's Funding for PEX pupils above the 90% will be based on termly Census data and the £10,250 pro-rata accordingly.

EHCP funding will remain per the Bury Special School Banding Model.

Financial Implications

The proposals can be met within the current Management Plan for the High Needs Block.

It was agreed:

That the Schools' Forum **does not** support the proposals set out in the report

7. HIGH NEEDS BLOCK (HNB) – FINANCIAL POSITION

Phil Herd presented a report informing the Schools' Forum of the projected spend on the HNB for the current financial year and the implication going forward.#

Bury has had a large HNB deficit for a number of years and was one of the first LA's to become a part of the DFE Safety Valve agreements. – Set out in appendix 1

As a requirement of the agreement the DFE must be informed of progress against the plan every quarter.

As at 31st March 2024, the HNB deficit was £2m less than what was in the plan (£18.5m compared to the planned £20.6m) At that point it was not a matter of concern. Since then expenditure has risen significantly and there is a need to revise the figures.

It was suggested that a High Needs Block sub group of the Schools' Forum be established.

It was agreed:

1. That the Schools' Forum note the current financial pressures on the HNB.
2. That any members wishing to join the sub group contact Andrea to advise.

.

Note: The meeting started at 4pm and ended at 5.30pm

Bury Council Department for Children and Young People

Schools and Academies Funding Update 2025-26

1. Dedicated Schools Grant 2025-26

Following the publication of the Dedicated Schools Grant (DSG) allocations on 18 December 2024, which takes into account the fully validated October 2024 pupil census, the 2025-26 DSG for Bury is summarised in the table below.

*Please note that the 2024-25 baseline shown below includes the Core Schools Budget Grant, Teachers Pension Grant and Teachers Pay Grant in the Schools Block and the Early Years Budget Grant in the Early Years Block. This is for the purpose of demonstrating the actual variance as these have been incorporated into the 2025-26 DSG.

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)
	* Final 2024-25 DSG, including additional grants	166,733,379	1,089,065	47,578,209	22,602,115	238,002,768
	2025-26	169,600,036	1,123,603	50,736,577	31,636,291	253,096,507
	Variance to 2024-25 £	2,866,657	34,538	3,158,368	9,034,176	15,093,739
	Variance to 2024-25 %	1.7%	3.2%	6.6%	40.0%	6.3%

2 Schools Block

The application of the NFF unit values, agreed at Schools Forum in December 2024, results in the allocations shown in Table 2 below. The amount of funding distributed to schools, including the centralised Rates payments, equates to almost 100% of the Schools Block Funding. The effect of pupil number variances between the October funding census collections for 2023 and 2024 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 226 funded pupils. Secondary schools have seen an overall net increase of 7 funded pupils.

For both sectors Forum will be aware that there will be individual schools with reductions, and others with gains to pupil numbers. They will all need to financially plan for pupil number changes, in order to achieve a balanced budget position.

Table 1 shows the pupil data variances in the individual factors. There are increases, particularly in Secondary schools, in the number of pupils attracting funding due to Deprivation, English as an Additional Language, and Mobility. It should be noted that the funding rate paid to each Local authority is based on the number of pupils, and

their funding characteristics. However, where we have increases in individual factors that would attract additional funding, the DfE funding is lagged by a year. This will mean that, in 2025-26, the balance available for transfer to the High Needs Block is significantly reduced.

Table 1 – Pupil Data

Factor	Sub-level	2024-25 Data	2024-26 Data	Variance	Variance %
Basic Entitlement Age Weighted Pupil Unit (AWPU)	Primary	15,863.00	15,637.00	-226.00	-1.4%
	Key Stage 3	6,965.50	6,982.50	17.00	0.2%
	Key Stage 4	4,519.00	4,509.00	-10.00	-0.2%
Deprivation Factors					
Free School Meals	Primary	3,455.36	3,427.00	-28.36	-0.8%
	Secondary	2,927.74	3,238.00	310.26	10.6%
Free School Meals - Ever 6	Primary	3,505.41	3,458.00	-47.41	-1.4%
	Secondary	3,097.25	3,388.76	291.51	9.4%
Income Deprivation Affecting Children Indices (IDACI) Primary	IDACI F	1,409.09	1,366.18	-42.91	-3.0%
	IDACI E	2,654.46	2,638.85	-15.61	-0.6%
	IDACI D	990.69	1,022.15	31.46	3.2%
	IDACI C	1,739.44	1,732.18	-7.26	-0.4%
	IDACI B	619.36	603.23	-16.13	-2.6%
	IDACI A	473.95	441.52	-32.43	-6.8%
Income Deprivation Affecting Children Indices (IDACI) Secondary	IDACI F	1,026.65	1,016.00	-10.65	-1.0%
	IDACI E	1,900.30	1,941.42	41.12	2.2%
	IDACI D	695.90	735.81	39.91	5.7%
	IDACI C	1,287.96	1,325.37	37.41	2.9%
	IDACI B	467.16	522.93	55.77	11.9%
	IDACI A	399.26	404.23	4.97	1.2%
Additional Educational Needs Factors					
English as an Additional Language (EAL)	Primary	1,748.33	1,847.44	99.11	5.7%
	Secondary	336.90	400.26	63.36	18.8%
Low Prior Attainment	Primary	5,102.33	5,134.68	32.35	0.6%
	Secondary	2,540.49	2,529.00	-11.49	-0.5%
Mobility	Primary	110.91	117.23	6.32	5.7%
	Secondary	37.82	71.13	33.31	100.0%
School Factors					
Lump Sum	Primary	63.00	63.00	0.00	0.0%
	Secondary	14.58	15.00	0.42	2.9%

Table 2 – Application of Funding Formula

Factor	Sub-level	2024-25	2025-26	Variance £	Variance %
Basic Entitlement Age Weighted Pupil Unit (AWPU)	Primary	£56,504,006	£60,155,539	£3,651,533	6.5%
	Key Stage 3	£34,980,741	£37,859,115	£2,878,374	8.2%
	Key Stage 4	£25,582,059	£27,563,517	£1,981,458	7.7%
Deprivation Factors					
Free School Meals	Primary	£1,693,126	£1,696,365.34	£3,239	0.2%
	Secondary	£1,434,593	£1,602,808.00	£168,215	11.7%
Free School Meals - Ever 6	Primary	£2,874,437	£3,665,480.30	£791,043	27.5%
	Secondary	£3,716,695	£5,269,519.00	£1,552,824	41.8%
Income Deprivation Affecting Children Indices (IDACI) Primary	IDACI F	£331,136	£321,052.00	-£10,084	-3.0%
	IDACI E	£756,521	£752,072.13	-£4,449	-0.6%
	IDACI D	£440,859	£454,854.65	£13,996	3.2%
	IDACI C	£843,627	£848,768.77	£5,142	0.6%
	IDACI B	£318,970	£313,679.60	-£5,290	-1.7%
	IDACI A	£322,286	£302,440.20	-£19,846	-6.2%
Income Deprivation Affecting Children Indices (IDACI) Secondary	IDACI F	£349,061	£345,440.00	-£3,621	-1.0%
	IDACI E	£855,135	£873,639.00	£18,504	2.2%
	IDACI D	£438,418	£467,239.84	£28,822	6.6%
	IDACI C	£888,689	£921,131.80	£32,443	3.7%
	IDACI B	£345,696	£389,582.95	£43,887	12.7%
	IDACI A	£377,304	£384,014.50	£6,710	1.8%
Additional Educational Needs Factors					
English as an Additional Language (EAL)	Primary	£1,031,515	£1,099,228	£67,713	6.6%
	Secondary	£533,990	£638,413	£104,423	19.6%
Low Prior Attainment	Primary	£5,969,730	£6,033,252	£63,522	1.1%
	Secondary	£4,509,362	£4,514,267	£4,905	0.1%
Mobility	Primary	£106,472	£113,125	£6,653	6.2%
	Secondary	£52,187	£98,515	£46,328	100.0%
School Factors					
Lump Sum	Primary	£8,467,200	£9,141,300	£674,100	8.0%
	Secondary	£1,960,000	£2,176,500	£216,500	11.0%
Total Allocated via NFF		£155,683,814	£168,000,858.19	£12,317,044	7.9%
Other Factors					
Rates		£1,538,229	£1,533,120	-£5,109	-0.3%
Minimum Funding Level		£341,724	£302,982	-£38,742	-11.3%
Minimum Funding Guarantee		£61,590	£198,906	£137,316	223.0%
Growth fund		£0	£0	£0	-
LA prior commitment to DfE for guaranteed pupil numbers for new high school Sep-25 to Mar-26		-£620,000	-£620,000	£0	-
Available for transfer to High Needs Block		£621,511	£184,170	-£437,341	-70.4%
TOTAL		£157,626,868	£169,600,036	£11,973,168	7.6%

Note: £184,170 transfer to the High Needs Block is 0.11% of the total Schools Block. This is within the permitted 0.5% which was approved at the last meeting.

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 overall amount of grant in the 2025-26 CSSB has increased by 3.2%.

The following should be noted:

- The centralised National Copyright Licences cost increases are not yet known but they have increased by more than the standard funding increase in recent years. Therefore provision is made for this in the figures below;
- there is a reduced requirement for the former Teachers' Pay and Pension Grant funding for teachers employed in central services due to restructures in CYP;
- the other services funded via the CSSB have been increased in line with the overall funding increase.

This leaves an unallocated balance of £128,400.

Movements from the Central Services Block to any other block are not subject to any limit and can be made in consultation with Schools Forum.

Central Schools Services Block (CSSB)	2024-25	2025-26	Variance £	Variance %
Section 251 – Central Provision				
1.4.2 Admissions	£213,600	£220,400	£6,800	3.2%
1.4.3 Schools' Forum	£18,300	£18,900	£600	3.3%
1.4.14 National Copyright Licences	£196,437	£212,200	£15,763	8.0%
Section 251 - Former ESG Services				
1.5.1 Education Welfare	£289,200	£298,500	£9,300	3.2%
1.5.2 Asset Management	£99,800	£103,000	£3,200	3.2%
1.5.3 Statutory / Regulatory inc SACRE	£70,000	£72,200	£2,200	3.1%
Section 251 - Other				
1.4.14 Teachers Pay and Pension Grant	£101,428	£70,003	-£31,425	-31.0%
Transfer to High Needs	£100,300	£128,400	£28,100	28.0%
Total Central School Services Block (CSSB)	£1,089,065	£1,123,603	£34,538	3.2%

PROPOSAL 1:

Bury's Schools' Forum recommend the allocation of CSSB budgets as outlined to the applicable services for 2025-26 and to transfer the remaining balance of £128,400 to the High Needs Block in support of High Needs cost pressures and the DSG Management Plan.

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 overall amount of grant in the 2025-26 High Needs Block has increased by 6.6%.

The final allocations include adjustments for:

- October 2024 Special Schools census data;
- the new Brookhaven School (academy) – this will be adjusted by the DfE, as the new school funding was only applicable to 2024-25;

Further changes to the High Needs Block funding are made in-year where there are changes, particularly in relation to import/export adjustments.

As separate report on the High Needs position is included in the papers for this meeting.

High Needs Block	2024-25	2025-26	Variance £	Variance %
Basic entitlement factor unit of funding (area cost adjusted)	£4,699.78	£4,699.79	£0	0%
Number of pupils in special schools/academies	739	764	25	3.4%
Basic entitlement factor	£3,473,138	£3,590,640	£117,501	3.4%
High needs elements in the funding floor and gains calculation	£43,067,032	£46,067,444	£3,000,412	7.0%
Additional funding for new and growing special free schools	£629,167	£629,167	£0	0.0%
Import/export adjustment (based on January 2024 school census and February R06 2023/24 ILR)	-£294,000	-£294,000	£0	0.0%
Hospital Education plus historic teachers pay/pension	£702,872	£0	-£702,872	
Hospital Education	£0	£618,350	£618,350	
Historic teachers pay/pension	£0	£124,976	£124,976	
Hospital Education plus historic teachers pay/pension	£702,872	£743,326	£40,454	5.8%
Total High Needs Block before deductions	£47,578,209	£50,736,577	£3,158,367	6.6%
FE/Academy Recoupment	-£5,272,169	-£5,468,000	-£195,831	3.7%
Total High Needs Block after FE/Academy Recoupment	£42,306,040	£45,268,577	£2,962,536	7.0%

5. Early Years Block

Forum should note that the Early Years Block will be adjusted in-year in respect to fluctuations in Early Years participation. The final funding allocation is based on two sets of January census data:

January 2025 accounts for April 2025 to August 2025 (5/12ths)
 January 2026 accounts for September 2025 to March 2026 (7/12ths)

Therefore, the funding received from the DfE is based on take up of places as at the two census dates. The Authority funds Early Years providers on actual take up of places, as notified by providers through the Early Years Portal which means that there is inevitably a variance in the funding allocated and the actual costs each year.

The free childcare offer has been extended so that eligible working parents in England will be able to access 30 hours of free childcare per week for 38 weeks per year from the term after their child turns 9 months to when they start school.

There has also been an above inflation increase to the Pupil Premium funding rate in the Early Years Block. This has risen from £0.68 per hour to £1.00 per hour.

The initial indicative funding for 2025-26 is therefore significantly higher than in 2024-25.

DSG Early Years Block	2024-25	2025-26	Variance	
3&4 YO Basic Entitlement	£8,371,250	£8,738,545	£367,295	4%
3&4 YO Extended Entitlement	£4,448,121	£4,643,286	£195,165	4%
2-year-old disadvantaged entitlement	£2,033,443	£2,138,531	£105,088	5%
2-year-old entitlement for working parents	£3,815,766	£6,227,912	£2,412,146	63%
Under 2s entitlement	£3,230,511	£9,217,120	£5,986,609	185%
Early Years pupil premium for 3 & 4-year-olds	£116,269	£170,983	£54,714	47%
Early Years pupil premium for 2-year-olds	£44,187	£64,980	£20,793	47%
Early Years pupil premium for under 2s	£5,256	£5,849	£593	11%
Disability access fund for 3 & 4-year-olds	£123,760	£129,444	£5,684	5%
Disability access fund for 2-year-olds	£32,760	£30,016	£-2,744	-8%
Disability access fund for under 2s	£11,830	£9,380	£-2,450	-21%
Maintained Nursery Supplementary Funding	£235,878	£260,245	£24,367	10%
TOTAL	£22,469,031	£31,636,291	£9,167,260	41%

For 2025-26 Local authorities are required to pass-through at least 96% of funding for each of the following funding entitlement streams individually:

- 3 & 4YO entitlements
- Under 2s
- 2YO disadvantaged offer
- 2YO working parents

This pass-through requirement ensures that most of the government funding reaches providers so that they can deliver the government's free entitlements. Bury has historically passported more than the minimum requirement for 2, 3 and 4 year-olds.

It should be noted that the DfE has increased the minimum pass-through requirement from 95% to 96% for 2025-26, and it is likely to be further increased in future years following the increase in Early Years funding.

The percentage retained by Local Authorities is used to contribute to Early Years SEN inclusion costs, central support services covering advisory support, sufficiency requirements, free entitlement eligibility checking, and management and administration of the complex Early Years Single Funding Formula determinations, allocations, systems, and statutory reporting requirements.

The table below shows the proposed Central Early Years budget.

The proposed budget exceeds the 96% pass-through requirement for each funding stream, as the Pupil Premium and Disability Access Funds are passed on in full. The overall proposed central budget is 3.7% of the total funding.

DSG Early Years Block	2025-26	Proposed Central Budget	
3&4 YO Basic Entitlement	£8,738,545	£264,638	
3&4 YO Extended Entitlement	£4,643,286	£286,992	
2-year-old disadvantaged entitlement	£2,138,531	£53,313	
2-year-old entitlement for working parents	£6,227,912	£155,257	
Under 2s entitlement	£9,217,120	£419,124	
Early Years pupil premium for 3 & 4-year-olds	£170,983	£0	
Early Years pupil premium for 2-year-olds	£64,980	£0	
Early Years pupil premium for under 2s	£5,849	£0	
Disability access fund for 3 & 4-year-olds	£129,444	£0	
Disability access fund for 2-year-olds	£30,016	£0	
Disability access fund for under 2s	£9,380	£0	
Maintained Nursery Supplementary Funding	£260,245	£0	
TOTAL	£31,636,291	£1,179,324	3.7%

PROPOSAL 2:

Bury's Schools' Forum approve the above allocation of the Early Years Block.

This page is intentionally left blank

Bury Council
Department for Children and Young People



Agenda Item

Report to Schools Forum

Date 14th January 2025

For Information and Recommendation

Author Phil Herd

Contact

email Elissa.Reevell@bury.gov.uk

Elissa Reevell -Stephen Holden

High Needs Block (HNB) Proposed Budget 2025-26

1. Purpose of the Report

1.1 To inform Schools Forum of the proposed HNB budget for the financial year 2025-26.

1.2 To seek comments on the proposed unit funding levels for 2025-26.

2. Background

2.1. The HNB allocation for 2025-26 is £50.107m and comprises of: -

<u>High Needs Block Allocation</u>	
	£m
Basic Calculation	46.067
Special Schools	3.591
Pupils Net Export	-0.294
Hospital Education	0.618
Teachers Pay & Pensions	0.125
TOTAL	50.107

2.2 Bury's HNB allocation is relatively high when compared to statistical neighbours. Any movement towards a more "rational" formula will not be favourable.

2.3 The proposed summary of budgeted spend and income is as follows: -

Summary of Bury HNB Budget 25-26			
	£m	App	%age
Expenditure			
Special Schools & PRU	20.928	1	38
Resourced Provision	2.856	2	5
EHCP Funding	29.618	3	53
Inclusion and Home Tuition	1.026	4	2
SEN Support Services	1.123	4	2
Total Expenditure	55.551		100
Income			
HNB Allocation	-50.107		
Health Funding	-1.600		
Schools Block Transfer	-0.200		
Bury Council Contribution	-2.000		
FE Direct Funding Adjustment	1.272		
PSV Income	-0.702		
Total Income	-53.337		
In Year Deficit	2.214		
Deficit B/f (Appx)	20.319		
Budgeted Deficit C/f	22.533		

This shows a budgeted deficit of £2.214m which is far from ideal. At the time of writing this report the Schools Block can only afford to transfer £0.2m against a target of £0.7m.

3. Risks to the Budget

- 3.1 A deficit is already budgeted for and any overspends will increase the deficit further.
- 3.2 The PSV income is not guaranteed and maybe withdrawn.
- 3.3 The health income is subject to negotiations and may well reduce.
- 3.4 EHCP numbers could increase higher than what is provided in the budget.

4. Unit Values

- 4.1 The unit values included within the budget are as follows.

Unit Values Included in the HNB Budget 2025-26 (Special Schools and PRU)			
	Value 24-25	Value 25-26	%age Increase
<u>Special Schools and PRU</u>	£	£	
-			
Band A	9,000	9,180	2
Band B	11,300	11,530	2
Band C	13,500	13,770	2
Band D	18,000	18,360	2
Band D+	25,200	25,700	2
Band E	40,000	40,800	2
Special	31,000	31,620	2
Special	50,400	51,410	2
Perm Excluded	8,590	10,250	19

The Permanent Excluded Rate increase was not recommended at the last Forum meeting. This was considered in great detail and unfortunately the current situation with the building and the fact that rates were below most GM LA's it has been deemed necessary to increase this. This can be reviewed in future.

Unit Values Included in the HNB Budget 2025-26			
Mainstream Schools			
	Value	Value	%age
	24-25	25-26	Increase
<u>Mainstream Schools</u>	£	£	
-			
Band 1	2,500	2,500	0
Band 2	5,000	5,000	0
Band 3	7,500	7,500	0
Band 4	10,000	10,000	0
Band 5	12,500	12,500	0
Res Provision	8,000	8,000	0

The nil increase for mainstream schools is in line with the Management Plan. The numbers of EHCP's are increasing and so are the numbers of higher bands. It is therefore not possible to increase the unit values.

5 Special Schools

5.1 The place numbers, unit values top ups etc for special schools are shown in Appendix 1.

5.2 Table A shows the numbers up to August and those from September, where there are changes. Table A is top ups only.

Table B is a summary of all the budgeted amounts for all special schools.

5.3 The budget assumes that special schools will be full (excluding OOB pupils) which is the ideal situation, in order to avoid more expensive independent special schools. In reality, there is likely to be some vacancies which would lead to a saving in this budget, however that would probably just offset a pressure in the independent sector budget.

6 Resourced Provision

6.1 A summary of the Resourced Provision Budget is given in appendix 2. As with special schools it is hoped that most be places will be occupied in order to avoid more expensive costs.

6.2 There is an issue that there are far more primary RP places than in the secondary sector. This can lead to issues at transition and something that is being considered as part of the Management Plan going forward

7 EHCP's Budgets

7.1 A summary of the EHCP budgets is provided within appendix 3. There are significant risks in this area as highlighted in the notes of this appendix.

8 SEN Inclusion and SEN Support Services

8.1 A summary of central SEN support services is given in appendix 4. This is for the purpose of completion and there are not any risks associated with these budgets.

9 Management Plan

9.1 A considerable amount of work needs to be carried out in order to pay back the deficit in the next 4 years. Schools Forum will be informed of future progress on this.

10 Conclusions

10.1 The budget is in a £2.2m deficit position which is a huge risk and makes future recovery more difficult.

10.2 Even allowing for this deficit many of the targets are challenging.

10.3 The above 2 factors mean it is not possible to increase special school factors by more than 2% and mainstream schools by 0%.

Table A Top Ups Only**Appendix 1**

Band	Value £	Millwood		From August		Total £ £	Elms Bank All Year	
		Until August Nos	£	Nos	£		Nos	£
A	9,180						31	284,580
B	11,530						84	968,520
C	13,770	57	329,009	65	519,865	848,873	100	1,377,000
D	18,360	97	746,523	111	1,183,692	1,930,214	109	2,001,240
D+	25,700	17	183,139	19	283,615	466,754	5	128,500
E	40,800							
Special	31,620	2	26,509	2	36,731	63,240		
Special	40,800						6	244,800
Special	51,410	2	43,100	3	89,580	132,680		
Totals	Top ups	175	1,328,279	200	2,113,483	3,441,762	335	5,004,640

Table A Top Ups Only

Band	Value £	Cloughside		Spring Lane		Brookhaven				
		All Financial Year		All Financial Year		Until August		From August		Total £
		Nos	£	Nos	£	Nos	£	Nos	£	
1	11,420	34	388,280			24	92,353	29	154,626	246,980
2	14,360	14	201,040			15	72,497	25	167,422	239,919
Hospital	26,010	14	364,140			5	28,860	15	119,969	148,829
B	11,530			6	69,180	5	38,481	5	53,319	91,800
C	13,770			20	275,400					
D	18,360			20	367,200					
PEX	10,250			90	922,500					
Totals	Top ups	62	953,460	136	1,634,280	49	232,191	74	495,337	727,528

Table B All Funding Streams**Summary of Total Budgetted Numbers and Amounts for Special Schools**

School	Equated Nos (Places)	Place Funding £	Top up Funding £	Tpeg £	Split Site £	Rents £	Total £	Total Funding per Place £
Millwood	190	1,895,833	3,441,762	125,125			5,462,720	28,814
Elms Bank	356	3,560,000	5,004,640	234,960	146,020	250,000	9,195,620	25,830
Brookhaven	80	800,000	727,528	52,800			1,580,328	19,754
Cloughside	62	620,000	953,460	31,680			1,605,140	25,889
Spring Lane	136	1,360,000	1,634,280	89,760			3,084,040	22,677
TOTALS	824	8,235,833	11,761,670	534,325	146,020	250,000	20,927,848	25,411

Summary of Budgeted Resource Provision

Schools	Sector	Placement Costs £	Est Top Ups £	Total £
Chantlers RP	Primary	100,000	80,000	180,000
East Ward RP	Primary	200,000	160,000	360,000
Higher Lane Primary RP	Primary	124,167	99,333	223,500
Mersey Drive RP	Primary	140,000	112,000	252,000
Our Lady of Lourdes KS2 RP	Primary	100,000	80,000	180,000
Summerseat RP	Primary	100,000	80,000	180,000
Unsworth Primary RP	Primary	140,000	112,000	252,000
Woodbank RP	Primary	120,000	96,000	216,000
Woodhey High RP	Secondary	150,000	120,000	270,000
Hoyle Nursery RP	Nursery	120,000	96,000	216,000
Whitefield Hub / The ARK SEND Unit	Primary	35,000	28,000	63,000
Peel Brow	Primary	83,333	66,667	150,000
Our Lady of Lourdes KS1 RP	Primary	83,333	66,667	150,000
Secondary RP	Secondary	58,333	46,667	105,000
Contingency Costs			58,333	58,333
TOTALS		1,554,167	1,301,666	2,855,833

Appendix 3

Summary of EHCP Funding	£m	Note
Early Years SEN Support Plus Funding	0.030	1
Early Years EHCP Funding	0.270	1
Mainstream EHCP Top-Up	11.822	2
Recoupment from Other LAs	-0.200	
Independent School Providers	12.411	3
EHCP Funding - Pupils in OOB Schools	1.680	
Post-16 SEND Commissioned Places	1.957	
Alternative Provision	0.979	
Personal Budgets for Education	0.630	
Therapy Funding for SEND Pupils	0.040	
TOTAL EHCP Funding	29.618	

Notes

- 1 These budgets were previously part of the Early Years Block DSG, which was incorrect. Within the totality of the DSG deficit this virement is neutral.
- 2 This allows for 28 new EHCP's from April and 25 from September. This is a challenging number and there is a risk of it being exceeded. There is also an estimate for anticipated leavers in September.
- 3 The Independent School budget allows for 207 pupils at an average cost of £59,955. There are currently 230 pupils within this sector and again this target is challenging.

Appendix 4

Summary of SEN Inclusion Services	£
Primary Inclusion Partnerships	175,200
Outreach Team	694,500
Secondary Inclusion Partnerships	34,700
Home Tuition	86,600
Hospital Tuition	35,000
Total Inclusion and Home TuitionTuition	1,026,000
Bury Safeguarding Children Partnership Recharge	41,200
Sensory Support Team (HI and VI Team)	1,081,800
Total Send Support Services	1,123,000

This page is intentionally left blank