

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

**Attendance**

**Early Years**

None in Attendance

**Maintained Primary**

Richard Ainsworth  
Simon Waddington

Governor (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 Sector**

Joanne Burns  
Helena Thom

NASUWT  
NEU

**16 – 19 Education Representative**

Carinna Vitti

Holy Cross College

**Children's Services Department**

Philip Herd  
Stephen Holden  
Elissa Reeve  
Alison Vidler

Finance 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.

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