

**AGENDA FOR
BURY SCHOOLS' FORUM**



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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:	Thursday, 2 November 2023
Place:	Microsoft Teams
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 - 6)*

The Minutes of the last meeting of the Schools' Forum held on 13 June 2023 are attached

3 MATTERS ARISING

4 NATIONAL FUNDING & BURY'S FORMULA *(Pages 7 - 14)*

Schools and Academies Funding Report attached

5 SCHOOLS WITH EXCESS SURPLUS BALANCES *(Pages 15 - 16)*

Schools with Excess Surplus Balances 2022-2023 attached

6 PROJECT SAFETY VALVE

A verbal update will be given at the meeting.

**Bury Schools Forum
Tuesday 13 June 2023
Microsoft Teams**

Attendance**Early Years**

Rachel O'Neil

Headteacher – Hoyle Nursery

Maintained PrimaryRichard Ainsworth,
Joanne Hurst,
Simon Waddington,Governor (Plus Governors Forum)
Headteacher - Millwood Special School
Headteacher – Hollins Grundy Primary**Maintained Secondary**

Tina Owen

Headteacher – Philips High School

Academy PrimaryRachel Pars
Martin Van HeckeBury College Education Trust – Elton Primary
Roch Valley Trust – St Thomas Primary School**Academy Secondary**

None in Attendance

SpecialJoanne Hurst
Orienne Langley-Sadler
Katherine Ashworth
Kristie BloomfieldHeadteacher - Oak Learning partnership
Headteacher - Elms Bank School & College
Millwood
Oak Learning Partnership**College**

Neil Howarth (S)

Holy Cross College

Pupil Referral Unit

None in Attendance

Non-Schools Sector

Helena Thom

NEU

Children's Services Department

Isobel Booter	Director of Education & Skills
Paul Cooke	Head of Schools & Academies
Sam Evans	Director of Finance
Victoria Lambert	Finance Business Partner Children & Young People
Alison Vidler Finance)	Principal Finance Officer (Schools & Systems)

Observers:

Elissa Reevel

1 APOLOGIES FOR ABSENCE

Paul Lord,
Tina Owen
Carina Vitti
Susan Southworth

Headteacher – Heaton Park Primary School
Headteacher - Philips High School
Principal – Holy Cross College
Governor

2 APPOINTMENT OF CHAIR

It was agreed:

That Rachel Pars, Head Teacher Elton County Primary School be nominated as Chair to the Bury Schools' Forum.

3 INTRODUCTIONS WELCOME NEW MEMBERS

All those present were welcomed to the meeting.

4 MINUTES OF THE LAST MEETING

It was agreed:

That the Minutes of the Meeting held on 17 January 2023 be approved as a correct record.

5 MATTERS ARISING

There were no matters arising.

6 BURY'S SCHOOL FORUM REPRESENTATION - JANUARY 2023 CENSUS

Alison Vidler presented Bury Schools' Forum Representation – January 2023 Census report.

A question was raised regarding the membership of the Forum and the vacancies that required filling.

It was explained that there were some vacancies and requests to fill these would be taken through BASH and BAPH and the Headteachers Forum and the Governor's Forum.

It was also reported that the Union Members came under the Teacher Professional Association category.

7 NATIONAL FUNDING FORMULA - PLANNED REMOVAL OF RECEPTION UPLIFT

Alison Vidler presented the National Funding Formula – Reception Uplift report.

The following comments and questions were received:

- Simon Waddington asked whether the money would still remain with the Local Authority?

It was explained that this was the case, the money would remain in schools block to be allocated another way.

- It was asked whether there would be a local opportunity to retain this element of funding in the local formula

It was reported that, as part of the move to the National Funding Formula, notice from the DFE was expected in relation to removing the current flexibility of applying the uplift from April 2025. This means that there would be no opportunity to apply the uplift in Bury's local formula.

8 DEDICATED SCHOOLS GRANT (DSG) DEFICIT POSITION 2022/2023

Isobel Booter presented the Dedicated Schools Grant (DSG) Deficit Position 2022/23 report.

- It was asked whether there would be clawback in 2023-24 from schools with surplus balances.

It was explained that the clawback from the two special schools in 2022-23 had been carried out after taking into account the use of 2021-22 balances in the budget plans for 2022-23. The same exercise will be conducted for planned use of 2022-23 balances before determining if there should be any clawback in 2023-24. This is in accordance with the Scheme for Financing Schools.

- It was asked whether there were any patterns in relation to the schools in deficit.

It was explained that all schools had been affected by the increase in energy costs .

It was also explained that there were falling rolls currently and an older population in the north of the borough which was forecast to continue with a younger population to the south and more popular schools. Analysis was ongoing in relation to this.

A report would be brought to a future meeting of Schools' Forum in relation to school rolls.

9 DSG DEFICIT RECOVERY - PROGRAMME SAFETY VALVE (PSV)

Isobel Booter, Director of Education and Skills gave a presentation updating the Schools' Forum on Project Safety Valve.

The presentation explained:

- Where PSV was currently,
- The strategies that were in place to make sure that all PSV spending was correct and being allocated as required.
- Work being done to maximise income
- Work being done to reduce unit costs including removing Band D plus, Inclusion funding, new provision due to come on line
- Challenges from the DFE
- The Safety Valve agreement
- Number of SEN assessments and education and work being done to reduce them.

Those present were given the opportunity to ask questions and make comments and the following points were raised:-

- It was explained that the special schools in the borough had taken the brunt of PSV but had been affected by the rises in SEN cases for years with Elms Bank School and College pupil number increasing from 116 to 300 over the years.
- It was suggested that all headteachers should be brought together to discuss the issues raised and it was suggested that this request be taken through BASH and BAPH.
- The need to focus on early years assessments.
- Work to ensure that children stay in mainstream provision.
- Early help 0 – 5 intervention.
- Connecting Health and Social Care provision and how systems talk to each other including nurseries talking to schools.
- Giving early years the tools to support colleagues.
- What training packages could be shared.

It was reported that a Management Plan was due to be completed by the end of the month. The draft plan would be presented to the DFE at the end of the week after which a meeting with the DFE would be taking place prior to the plan being submitted.

**Rachel Pars
Chair**

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

Bury Council Department for Children and Young People

Schools and Academies Funding 2024-25

1. Indicative Dedicated Schools Grant (DSG) 2024-25

The information below provides indicative DSG funding for Bury as announced by the Department for Education (DfE) in October 2023, with comparisons to the previous announcement made in July 2023 and to the last financial year 2023-24.

1a. Schools Block

<u>Indicative</u> National Funding Formula (NFF) 2024-25	DSG 2023-24	DSG 2024-25 Jul-23	DSG 2024-25 Oct-23	Variation 2024-25 to 2023-24	
Schools Block					
Primary schools unit of funding	£4,813.37	£5,110.55	£5,063.97	£250.60	5.2%
Number of pupils in primary schools	16028.5	16028.5	16028.5	0	0.0%
Primary schools total	£77,151,102	£81,914,426	£81,167,823	£4,016,721	5.2%
Secondary schools unit of funding	£6,276.54	£6,682.90	£6,620.49	£343.95	5.5%
Number of pupils in secondary schools	11328.5	11328.5	11328.5	0	0.0%
Secondary schools total	£71,103,784	£75,707,260	£75,000,200	£3,896,416	5.5%
Premises factor	£1,232,386	£1,538,229	£1,538,229	£305,843	24.8%
Growth Funding*	£344,896	£633,656	£633,656	£288,760	83.7%
Falling Rolls Funding*	£0	£0	£0	£0	0.0%
Total Schools Block before recoupment	£149,832,168	£159,159,913	£158,339,906	£8,507,738	5.7%
Deductions for academy recoupment	-£72,973,297		-£80,649,281		
Deductions for payments for National Non-Domestic Rates (NNDR)	-£1,188,225		-£1,538,229		
Total Schools Block after recoupment	£75,670,646		£76,152,396		

Schools received additional funding through the Mainstream Schools Additional Grant in 2023-24 and this funding has been added to the baseline funding for 2024-25.

Growth and Falling Rolls funding is measured at Middle Super Output Area level, not at individual school level, on differences between the October 2022 and October 2023 census data.

* Indicative Growth and Falling Rolls Funding shown above is calculated on May 2023 census adjusted with September admission numbers for existing schools and a lump sum for the new Free School. The final allocation will be confirmed by the DfE in December 2023.

1b. High Needs Block

Indicative	DSG 2023-24	DSG 2024-25 Oct-23	Variation 2024-25 to 2023-24	
National Funding Formula (NFF) 2024-25				
High Needs Block				
High needs elements in the funding floor and gains calculation	£39,948,132	£43,067,031		
Additional High Needs Funding	£1,834,157	0		
Baseline High Needs funding	£41,782,288	£43,067,032	£1,284,744	3%
Basic entitlement factor unit of funding (area cost adjusted)	£4,700.08	£4,699.78	-£0	0%
Number of pupils in special schools/academies	613.5	613.5	£0	0%
Basic entitlement factor	£2,883,500	£2,883,314	-£186	0%
Additional funding for new and growing special free schools	£6,000.00	£0	-£6,000	-100%
Import/export adjustment (based on January 2023 school census and February R06 2022/23 ILR)	-£282,000.00	-£276,000	£6,000	-2%
Hospital Education plus historic teachers pay/pension	£853,318	£355,615	-£497,703	-58%
Total High Needs Block before deductions	£45,243,107	£46,029,961	£786,855	1.7%
Total High Needs Block after FE/Academy Recoupment	£40,661,107	£41,447,961		

Bury's Hospital Education funding has been adjusted for additional places in the current 2023-24 financial year and is not yet reflected in the 2024-25 indicative figures. Actual 2024-25 high needs allocations will be based on updated pupil and student numbers, and any later adjustments to hospital education funding.

1c. Central Schools Services Block

Indicative	DSG 2023-24	DSG 2024-25 Oct-23	Variation 2024-25 to 2023-24	
National Funding Formula (NFF) 2024-25				
High Needs Block				
CSSB unit of funding	£37.18	£38.96	£1.78	5%
Number of pupils	27357	27357	£0	0%
Pupil funding factor	£1,017,133	£1,065,836	£48,702	5%
Funding for historic commitments	£20,811	£16,649	-£4,162	-20%
Total CSSB	£1,037,944	£1,082,485	£44,540	4.3%

Funding for historic commitments is subject to a year-on-year reduction.

1d. Early Years Block

Indicative	DSG 2023-24	DSG 2024-25 Oct-23	Variation 2024-25 to 2023-24	
National Funding Formula (NFF) 2024-25				
Early Years Block				
Hourly rate for 3 & 4 year olds	£4.90	TBC		
Number for universal entitlement funding (part-time equivalent)	2780.71	TBC		
Indicative funding for universal entitlement based on 38 weeks, 15hrs per week	£7,766,524	TBC		
Number for additional 15hrs entitlement funding (part-time equivalent)	1471.88	TBC		
Indicative funding for additional 15hrs entitlement	£4,110,961	TBC		
Hourly rate for 2 year olds	£5.73	TBC		
Number for 2 year old entitlement funding (part-time equivalent)	458.26	TBC		
Indicative funding for 2 year olds based on 38 weeks, 15hrs per week	£1,496,723	TBC		
Hourly rate for maintained nursery supplementary funding	£6.17	TBC		
Number of maintained nursery supplementary funding	61	TBC		
Indicative funding for maintained nursery supplementary allocation based on 38 weeks, 15hrs per week	£214,531	TBC		
Early years pupil premium	£147,238	TBC		
Disability access fund	£86,112	TBC		
Total Early Years Block	£13,822,089	TBC		

Early Years funding allocations are subject to future announcements. Additional funding has been provided through the Early Years Supplementary Grant to cover the period September 2023 to March 2024. This additional funding will be incorporated into the DSG allocation for 2024-25.

2 Formula Unit Values

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. For 2024-25, the Split Site Factor is compulsory for all local authorities.

For information, the Unit Values applicable to 2024-25 are set out below and, as outlined in the NFF, Schools Funding Operational and Technical Guidance issued by the DfE:

Factor	Sub-level	2023-24	2024-25	Variance to 2023-24		Of which = MSAG transfer	Variance excl. MSAG transfer
		£	£	£	%	£	%
Basic Entitlement	Primary	3,394	3,562	168	4.9%	119	1.4%
Age Weighted Pupil Unit (AWPU)	Key Stage 3	4,785	5,022	237	5.0%	168	1.4%
	Key Stage 4	5,393	5,661	268	5.0%	190	1.4%
Deprivation							
Free School Meals	Primary FSM	480	490	10	2.1%	0	2.1%
	Secondary FSM	480	490	10	2.1%	0	2.1%
Free School Meals - Ever 6	Primary FSM 6	705	820	115	16.3%	104	1.6%
	Secondary FSM 6	1,030	1,200	170	16.5%	152	1.7%
Income Deprivation Affecting Children Indices (IDACI) Primary	IDACI F	230	235	5	2.2%	0	2.2%
	IDACI E	280	285	5	1.8%	0	1.8%
	IDACI D	440	445	5	1.1%	0	1.1%
	IDACI C	480	485	5	1.0%	0	1.0%
	IDACI B	510	515	5	1.0%	0	1.0%
	IDACI A	670	680	10	1.5%	0	1.5%
Income Deprivation Affecting Children Indices (IDACI) Secondary	IDACI F	335	340	5	1.5%	0	1.5%
	IDACI E	445	450	5	1.1%	0	1.1%
	IDACI D	620	630	10	1.6%	0	1.6%
	IDACI C	680	690	10	1.5%	0	1.5%
	IDACI B	730	740	10	1.4%	0	1.4%
	IDACI A	930	945	15	1.6%	0	1.6%
Additional Education Needs Factors							
English as an Additional Language (EAL)	EAL 3 Years Primary	580	590	10	1.7%	0	1.7%
	EAL 3 Years Secondary	1,565	1,585	20	1.3%	0	1.3%
Mobility	Pupils starting school outside normal entry	945	960	15	1.6%	0	1.6%
		1,360	1,380	20	1.5%	0	1.5%
Low cost, high incidence SEN	Low Attainment Primary (below expected EYFS)	1,155	1,170	15	1.3%	0	1.3%
	Pupils not achieving (KS2 level 4 English and Maths)	1,750	1,775	25	1.4%	0	1.4%
School-Led Factors							
Lump Sum	Primary	128,000	134,400	6,400	5.0%	4,510	1.5%
	Secondary	128,000	134,400	6,400	5.0%	4,510	1.5%
Split Site	Basic Eligibility		53,700				
	Distance Eligibility Minimum		0				
	Distance Eligibility Maximum		26,900				
Minimum Per Pupil Funding Levels	MFL - Primary	4,405	4,610	205	4.7%		
	MFL - Secondary	5,715	5,995	280	4.9%		

RECOMMENDATION 1:

Schools' Forum (all members) recommends all the unit values specified in the table above, to be applied in compliance with the National Funding Formula (NFF) to Bury's Mainstream schools and academies funding formula for 2024-25.

3. De-delegation

For maintained mainstream schools only, 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 any of these services.

Schools' Forum (Maintained Mainstream only) is required to recommend the De-delegated items each year. The table below proposes the level of de-delegation to be recommended for 2024-25.

	Schools of Concern	FSM Benefits checking	Trade Union Facilities Time	Local Authority School Improvement
	Per pupil	Per FSM6	Per pupil	Per pupil
2023-24	£6.30	£5.25	£4.20	£15.00
Proposed 2023-24	£6.62	£5.51	£4.41	£15.75

RECOMMENDATION 2:

Schools' Forum (maintained school representatives) recommends the de-delegated values for 2024-25, summarised as follows:

- Schools of Concern @ £6.62 per pupil
- Free School Meals Eligibility Checking @ £5.51 per FSM6
- Trade Union Facilities Time @ £4.41 per pupil
- School Improvement Brokerage and Monitoring Grant @ £15.75 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.

Local authorities will be able to set an MFG between +0.0% and +0.5% per pupil.

RECOMMENDATION 3:

Schools' Forum (all members) recommends that the MFG protection is set at +0.5% in line with DfE guidance.

5. Headroom

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

- October 2023 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 increased pupil intakes require additional classes to meet infant class size regulations, or to meet Basic Need requirements, funding needs to be either retained to fund in-year growth or estimated upfront within school budget allocations where data is known about planned growth prior to the final budgets being determined and published.

Growth funding will specifically be needed for the new free school due to open in Radcliffe in September 2024.

- 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.
- Minimum 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. For information, 0.5% of Bury's 2024-25 indicative Schools Block is circa £791,700.

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.

5a Growth Funding

The Local Authority is required to set criteria for the allocation of growth funding.

The growth fund can only be used to:

- Support growth in pre-16 pupil numbers to meet basic need.
- Support additional classes needed to meet the infant class size regulation.
- Meet the costs of new schools.

The growth fund must not be used to support:

- Schools in financial difficulty.
- General growth due to popularity; this is managed through lagged funding. This includes cases where academies have admitted above the pupil admission number (PAN) by their own choice.

The primary growth factor value for 2024-25 is £1,550.

Funding for maintained schools is provided to cover the period from September to March before the lagged funding system 'catches up' from the subsequent April through the subsequent year's NFF. Since academies are funded on an academic year basis, they would receive additional funding (at a rate of an additional five sevenths of the allocation) to cover a full year's growth funding before the system 'catches up'.

RECOMMENDATION 4:

Schools' Forum (all members) recommends the criteria below for allocating growth funding.

Growth fund allocations will be made for LA approved bulge classes in the first year, or for LA agreed expansion classes as the expansion moves up the school.

These will be funded from the centrally retained growth fund. Funding for new classes will be set above the minimum funding expectation set by DfE.

Growth funding will be allocated as follows:

primary growth factor value x number of pupils x ACA

The primary growth factor value will be used for all school types - recognising there is one teacher pay scale and that this funding is a minimum value.

RECOMMENDATION 5:

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 2024.

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Bury Council
Department for Children and Young People

Schools with Excess Surplus Balances 2022-23 For Information

The overall schools' balances position at the end of the 2022-23 financial year was presented to Schools Forum at the meeting of 13 June 2023. Further information was requested of the plans for schools with excess surplus budgets in 2023-24.

The schools shown below had excess surplus balances at the end of the 2022-23 financial year. Following a review of the 2023-24 budget plan for each school, it was found that the excess surplus had been committed to costs in the 2023-24 budget plan.

School Name	2022-23 Revised Budget	2022-23 Income/ Expenditure Actual	2022-23 Balance	2022-23 Permissible c/fwd	Excess surplus	Less 2023-24 in-year deficit	Amount to Clawback
Manchester Mesivta	1,422,217	1,276,636	145,581	71,111	74,470	-94,640	0
Philips High	5,562,275	5,152,277	409,998	278,114	131,884	-197,957	0
The Derby High	5,993,014	5,016,852	976,162	299,651	676,511	-895,682	0
All Saints C of E Primary Stand	1,069,135	977,850	91,285	85,531	5,754	-47,955	0
Cams Lane Primary	1,000,062	910,925	89,137	80,005	9,132	-31,012	0
Chantlers Primary	1,322,700	1,147,568	175,132	105,816	69,316	-111,890	0
Fairfield Community Primary	1,241,297	1,132,738	108,559	99,304	9,255	-76,545	0
Hoyle Nursery School	736,828	613,956	122,872	58,946	63,926	-66,292	0
Park View Primary	1,955,164	1,779,975	175,189	156,413	18,776	-48,318	0
Ribble Drive Community Primary	1,025,515	930,689	94,826	82,041	12,785	-76,531	0
St Andrew's C of E Primary Ramsbottom	1,197,653	1,086,655	110,998	95,812	15,186	-33,451	0
St Paul's C of E Primary Bury	1,339,794	1,195,097	144,697	107,184	37,513	-57,194	0

Information prepared by
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