

**Bury Schools Forum
Tuesday 17 January 2023
Microsoft Teams**

Attendance

Early Years

Rachel O'Neil

Headteacher – Hoyle Nursery

Maintained Primary

Richard Ainsworth,
Nicola Carlile,
Paul Lord,
Joanne Hurst,
Simon Waddington,

Governor (Plus Governors Forum)
Headteacher, Old Hall Primary
Headteacher – Heaton Park Primary School
Headteacher - Millwood Special School
Headteacher – Hollins Grundy Primary

Maintained Secondary

Tina Owen

Headteacher – Philips High School

Academy Primary

Rachel Pars
Martin Van Hecke

Bury College Education Trust – Elton Primary
Roch Valley Trust – St Thomas Primary School

Academy Secondary

Lisa Corrigan

St Teresa of Calcutta RC MAT – St Gabriels RC High

Special

Joanne Hurst
Orienne Langley-Sadler

Headteacher - Oak Learning partnership
Headteacher -

Pupil Referral Unit

None in Attendance

Non-Schools Sector

Tony Durack
Helena Thom

NASUWT
NEU

Children's Services Department

Isobel Booler
Paul Cooke
Sam Evans
Alison Vidler
Finance)
Observers:
Zena Shuttleworth
Elissa Reevel

Director of Education & Skills
Head of Schools & Academies
Principal Finance Officer (Schools & Systems

Observer(s)

Katherine Ashworth

Millwood Special School

1. APOLOGIES FOR ABSENCE

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|--------------|--|
| Yusuf Erol | Finance Officer |
| Emma Moncado | Head Teacher, St Josephs R.C Primay School |
| Paul Turney | Deputy Chief Finance Officer |
| Carina Vitti | Principal – Holy Cross College |

2 MINUTES OF THE LAST MEETING

It was agreed:

1. That the Minutes of the meeting held on 15 November 2022 be approved as a correct record of the meeting.
2. That the Minutes of the meeting held on 5 January 2023 be approved as a correct record of the meeting subject to the inclusion of apologies from Joanne Hurst and recording that Katherine Ashworth was in attendance as a substitute.

3 MATTERS ARISING

Isobel Booter reported that there were still a number of Member vacancies to be filled and the Forum was currently without a Chair .

Isobel had reported the outstanding vacancies to headteacher groups.

Richard Ainsworth stated that he would raise the issue with the Governors Forum.

4 CHAIR AND MEMBERSHIP

The Membership of the Forum was attached to the agenda and the item was discussed in matters arising above.

5 SCHOOL & ACADEMIES FUNDING 2022/2023

Alison Vidler presented the Schools & Academies Funding update and explained that the focus of the Forum meeting was to consider and make recommendations on the 2023/24 funding factors that are required to be submitted to the DfE by the 21st January 2023 deadline. The recommendations will also be included in the Council budget setting requirements which go to full Council for approval on 22nd February 2023.

1. Dedicated Schools Grant

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 was summarised in the table set out in the report. 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.

2. Schools Block

(a) 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 and were detailed in the report provided.

(b) 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.

(c) De-delegation

Schools' Forum (Maintained Mainstream only) is required to recommend the De-delegated items

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.

Services directly funded by these de-delegated funds will be restricted to maintained schools only. Related services provided to other schools will be funded through alternative resources including the option for traded services.

- Schools of Concern at £6.30 per pupil
- FSM Benefits Checking £5.25 per FSM6
- Trade Union Facilities Time £4.20 per pupil
- Local Authority School Improvement £15 per pupil

RECOMMENDATION 1:

Bury's Schools' Forum (Maintained School representatives) agree 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 Page 17 6**
- **School Improvement Brokerage and Monitoring Grant @ £15.00 per-pupil**

(d) 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.

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.

RECOMMENDATION 2:

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

3. Central Schools Services Block (CSSB)

It was explained that the 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 as a percentage increase as set out in the report.

RECOMMENDATION 3:

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

6. HIGH NEEDS FUNDING ARRANGEMENTS AND SAFETY VALVE AGREEMENT

The DSG has four separate funding blocks, of which one is the high needs block (HNB), with a deficit of £21,214,351 at the end of financial year 2021/22. The HNB deficit has been subject to a Safety Valve Agreement with the DFE since March 2021.

The HNB collectively funds specialist education provision for children and young people up to 25 years old with Special Education Needs and Disabilities (SEND). The main areas of funding within the HNB are for:

- special school and further education (FE) college places including out of borough places
- top-up funding for nurseries, mainstream schools, special schools, FE colleges and independent schools linked to Education, Health and Care Plans (EHCPs)
- support for the provision of special services provided by schools and the local authority (LA), which include but are not limited to, the Sensory Service and resource provision in mainstream schools

The HNB pressure has been recognised on a national level, and forms part of the governments SEND review, including looking at how to better equip mainstream settings identify and support children and young people's needs, instead of being met by EHCPs or specialist provision.

There was an ambitious target of £3.3m of savings to be achieved in 2022/23, which was detailed within the report. £2.9m of the planned savings have been achieved.

The report set out national demand, demand in bury, impact on capacity in the Bury SEND system, independent and non-maintained special school placements. The developments set out mean that progress in reducing the DSG deficit is slower than anticipated and it will be very challenging against the increasing activity.

Schools Forum in the past has agreed to a 0.5% transfer to the High Needs Block (HNB) from the Schools Block. For 2023/24, the Council has not proposed a transfer at that level and is proposing a smaller transfer of 0.35% instead. This decision has not been made because of there being less need in Bury. It has been made for the following two reasons:

1. To make sure that schools are in receipt of no less than the unit values attached to the National Funding Formula factors; and
2. There is an acknowledgement across the Council, that whilst the HNB is under severe pressure, many school are also under significant financial pressures This is a decision which can only be made annually and therefore whilst it is anticipated a further transfer will take place in future years this cannot be included within the financial model at the current time.

It was explained that the financial forecast is disappointing, particularly given the efforts made to deliver the PSV project. As a result, all aspects of High Needs Funding are subject to ongoing review and there will be further difficult decisions required and a general commitment towards ensuring the graduated approach is used to meet needs earlier.

7. EARLY YEARS FUNDING

It was reported that the the Forum should note that the Early Years Block specifically will be adjusted in-year 2023-24 in respect to fluctuations in Early Years participation. The final funding allocation is based on two sets of January census data:

- January 2023 accounts for April 2023 to August 2023 (5/12ths)
- January 2024 accounts for September 2023 to March 2024 (7/12ths)

Therefore, the funding received from the DfE is based on take up of places as at the two census dates. Forum members should note that the Authority funds Early Years providers on actual take up of places, as notified by providers through the Early Years Portal. The initial indicative funding for 2023-24 was set out in the report.

Local authorities are required to pass-through at least 95% of their 3 and 4-year-old funding from the government to early years providers. This pass-through requirement ensures that most of the government funding reaches providers so that they can deliver the government's free entitlements. The pass-through rate in Bury is 96.7%.

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.

Following a consultation process, the DfE have made some changes to the formula applied to the Early Years block which impacts on the funding rates received by each Local Authority. This includes the former Teachers Pay and Pension Grant funding for Page 25 Agenda Item 7 2 Early Years settings which has been incorporated into the unit funding values for 2023-24.

The DfE funding rates for Bury were set out within the report.

RECOMMENDATION 4:

Bury's Schools' Forum agree the Early Years Hourly Rates specified for 2, 3 and 4 year olds.