

**Bury Schools Forum  
Thursday 2 November 2023  
Microsoft Teams**

**Attendance**

**Early Years**

Rachel O'Neil

Headteacher – Hoyle Nursery

**Maintained Primary**

Richard Ainsworth,  
Simon Waddington,

Governor (Plus Governors Forum)  
Headteacher – Hollins Grundy Primary

**Maintained Secondary**

Tina Owen

Headteacher – Philips High School

**Academy Primary**

Rachel Pars  
Kristie Bloomfield

Bury College Education Trust – Elton Primary  
Oak Partnership

**Academy Secondary**

Paul Johnson

Headteacher – Star Academies

**Special**

Joanne Hurst  
Orienne Langley-Sadler

Headteacher - Millwood Special School  
Headteacher - Elms Bank

**Pupil Referral Unit**

None in Attendance

**Non-Schools Sector**

Catherine Ainsley  
Helena Thom

NASUWT  
NEU

**Children's Services Department**

Isobel Booler  
Paul Cooke  
Victoria Lambert  
Alison Vidler  
Finance)  
Clare Williams

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

**Observer(s)**

Katherine Ashworth  
Zena Shuttleworth  
Elissa Reevel  
Patrick Grant

Millwood Special School  
  
  
DFE Observer

## **1. APOLOGIES FOR ABSENCE**

Carina Vitti Principal – Holy Cross College

## **2 MINUTES OF THE LAST MEETING**

### **It was agreed:**

That the Minutes of the meeting held on 13 June 2023 be approved as a correct record of the meeting.

## **3 MATTERS ARISING**

There were no matters arising from the Minutes of the last meeting.

## **5 NATIONAL FUNDING & BURY'S FORMULA**

Alison Vidler presented the Schools & Academies Funding update.

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

The report provided 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**

The report set out the National Funding Formula for 2024- 25 and the variation 2024 -25 to 2023-24 as:

Primary School Unit of Funding: 5.2%  
Secondary schools Unit of Funding: 5.5%  
Total Schools block before recoupment: 5.7%

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.

#### **1b. High Needs Block**

The report set out the National Funding Formula for 2024- 25 and the variation 2024 -25 to 2023-24 as:

Baseline High Needs Funding: 3%  
Total High Needs block before deductions: 1.7%

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

The report set out the National Funding Formula for 2024- 25 and the variation 2024 -25 to 2023-24 as:

CSSB Unit of Funding: 5%  
Pupil Funding Factor: 5%  
Funding for historic commitments: -20%

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

1d. Early Years Bock

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.

**Recommendation 1**

**Schools' Forum (all members) agrees 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.

Katherine Ashworth asked why free school meals eligibility checking was included and questioned why this could not be offered as a traded service.

Alison explained that the de-delegation only applied to maintained school but academies could buy in to the service. Maintained schools did not currently have that option as it was under de-delegation.

Tina Owen referred to School Improvement and the fact only the maintained schools were paying in.

Isobel explained that the funding had gone to schools causing concern and had only gone to 14 maintained schools for head teacher developmental programme.

It was asked whether a breakdown of how school improvement money was spent could be provided.

Paul Cooke reported that the total value was split 30% / 70% with the vast majority being maintained.

It was asked that a breakdown of figures be brought to the next meeting of Schools' Forum.

Simon Waddington stated that the de-delegation funding was becoming untenable. More schools had gone into deficit last year and this year some schools had a planned deficit. Simon explained that he had calculated the figures and it was becoming unsustainable. Would it be possible to fund through headroom.

Alison Vidler explained that under the funding regulations, it would not be possible to fund these services through headroom.

## **RECOMMENDATION 2:**

**Schools' Forum (maintained school representatives) does not agree 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) agrees 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
- Growth
- Falling Rolls Fund
- Minimum Funding Level

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.

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) agrees 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 agrees 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.**

## **6 SCHOOLS WITH EXCESS SURPLUS BALANCES 2022 -2023**

Alison Vidler presented a report setting out the schools that had excess surplus balances at the end of the 2022 -2023 financial year.

The report was provided for information.

**It was agreed:**

That the contents of the report be noted.

## **7 PROJECT SAFETY VALVE**

Isobel Booler gave an update on Project Safety Valve.

It was explained that since the last meeting of the Schools' Forum work had been ongoing to ensure that all strategies were in place to make sure that PSV spending was correct and appropriate.

There had been an increase of 63% of EHCPs and identifying and meeting need earlier was a priority.

The agreement had been signed to eradicate the PSV by 2024/25 but the plan was in the process of being reworked with a revised agreement of 2028/2029 eradication .

The plan had not been signed off to date as it was in the process of being presented to ministers and awaiting an outcome from Government.

It was explained that significant work had carried out to ensure that no spend comes from the high needs block that shouldn't.

Isobel explained that the Schools' Forum could establish a working group to review the PSV Management Plan and report back to the Forum with draft advice and decisions.

The working group would be made up of members of the Schools' Forum and would be supported by officers from the Council. The group could also include wider representation if required.

The group would be required to set its Terms of Reference as its first priority to be agreed by the Forum.

### **It was agreed:**

1. That the update be noted.
2. That any Members of the Forum wishing to sit on the PSV Working Group contact Andrea Tomlinson on [a.j.tomlinson@bury.gov.uk](mailto:a.j.tomlinson@bury.gov.uk)

**Rachel Parrs**  
**Chair**

Note: The meeting started at 4pm and ended at 5pm