

(BARKING AND DAGENHAM SCHOOLS FORUM)
17 January 2023

Title: Schools' Forum Report	
Open	For Decision / For Information
Wards Affected: All	Key Decision: No
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Accountable Operational Director: Jane Hargreaves – Commissioning Director for Education Youth and Childcare	
Accountable Strategic Director: Elaine Allegretti – Director for People and Resilience, Philip Gregory, Chief Financial Officer	
Summary: The purpose of this report is to update the Barking and Dagenham Schools Forum on:	
<ol style="list-style-type: none"> 1 2022/23 Projected DSG Outturn 2 DSG Funding Allocation for 2023/24 2(a) Central Schools Services Block (CSSB) Update 3 Early Years Update 2023/24 4 National Funding Formula - Indicative Schools Level Funding 2023/24 5 Mainstream School Additional Grant (MSAG) 2023/24 6 High Needs Block (HNB) Outturn Forecast for 2022/23 7 High Needs Provisional Budget 2023/24 8 De-delegation for 2023/24 9 Growth Fund for 2023/24 10 Falling Rolls for 2023/24 11 Trade Union facility time update 12 AOB. 	

Recommendation(s)

The Schools' Forum is requested to:

1. Note the updated 2022/23 DSG outturn
2. Note the 2023/24 DSG funding allocations 2023/24 & CSSB
3. Note and comment on the Early Years Funding.
4. Note, Comment & approve National Funding Formula - Indicative Schools Level Funding 2023/24
5. Note Mainstream School Additional Grant (MSAG) 2023/24
6. Note & Comment on the outturn forecast for High Needs Block for 2022/23
7. Note and comment High Needs Provisional Budget 2023/24
8. Note, Comment & approve proposed de-delegation for 2023/24
9. Note, Comment & approve proposed growth funding for 2023/24
10. Note, Comment & approve proposed falling roll funding for 2023/24
11. Note the update on proposed review of trade union facility time.
12. AOB

Reason(s)

The Schools Forum Regulations 2012 requires that the Schools' Forum meets regularly and is consulted by the local authority concerning the Dedicated Schools Budget and various related matters.

1. 2022/23 Projected DSG Outturn

1.1 The table below sets out the projected DSG outturn for 2022/23. All blocks are projecting a breakeven position except High needs which projecting £750k estimated underspend. DSG reserves brought forward from 2021/22 was £9,300k, this includes £1,180k relating to Early years, of which £554k and £255k are earmarked for Schools Facing Financial Difficulties (SFFD) and growth funding respectively.

1.2 The following may be considered for the use of DSG reserves, this is not an exhaustive list:

- Supporting schools, nurseries & PVI's with one-off exceptional payments to mitigate financial pressures due to increasing & complex SEND cases
- Financing falling roll shortfall from reserves instead of top slicing from schools block.
- Health provision in schools.
- Set up contingency fund to respond to emerging needs

	2022/23 Funding £'000	2022/23 Projected Outturn £'000	(Surplus) /Deficit £'000
Schools Block (ISB)	181,301	181,301	0
Central Services Block	2,224	2,224	0
High Needs Block	44,521	43,771	(750)
Early Years Block	21,877	21,877	0
	249,923	249,923	(750)
DSG reserves B/f			(8,120)
Add 21/22 EY underspend			(1,180)
Revised DSG Carried forward			(10,050)
Of Which			
Growth fund B/F			255
SFFD retained centrally			554
Projected DSG Reserves 2022/23			(9,241)

Table – 2022/23 projected DSG outturn

Recommendation (i): School Forum are asked to:

Note and comment on projected DSG outturn position for 2022/23

2. DSG Funding allocation for 2023/24

2.1 The 2023/24 DSG allocation for 2023/24 was published on the 16th of December 2022 with LBBD being granted the sum of **£342.693m** across the four blocks (before academy recoupment). The table below provides a breakdown of the grant across the DSG blocks and shows the movement in funding between 2022/23 and 2023/24.

	2022/23 DSG Final Allocation as at 17/11/22			20223/24 DSG Allocation as at 16/12/22			Movement
	Before Recoup't £'000	Less Recoup't £'000	Net £'000	Before Recoup't £'000	Less Recoup't £'000	Net £'000	
	a	b	c = a - b	d	e	f = d - e	
Schools Block	248,965	68,341	180,624	262,447	68,344	194,103	13,479
Central Block	2,224	-	2,224	2,162	-	2,162	-61
High Needs	48,877	4,369	44,509	55,380	4,444	50,936	6,427
Early Years	21,877	0	21,877	22,704	-	22,704	827
	321,943	72,710	249,233	342,693	72,788	269,905	20,672

Table - DSG Grant Allocation for 2022/23 - v - 2023/24 (in £'000s)

- 2.2 The overall increase in DSG since last year is **£20.672m**. The table above sets out the movement in funding from last year by block:
- 2.3 The total school block funding for 2023/24 is **£262.447m** as set out in the table below. This represents an increase of £13.4m from the previous year's allocation. The schools block allocation has been calculated on the basis of the guaranteed unit of funding for primary and secondary multiplied by the number of pupils on roll at the October 2022 census. The total pupil led funding is £251.418m and in addition to this is the allocation of £1.565m for growth and £9.463m for the premises factors (namely split sites, NNDR & PFI)
- 2.4 LBBD schools received a total of £6.985m in supplementary grant in 2022/23. The baseline rate per pupil is £6,245 which is a real increase in funding of 1.63% per pupil.

DSG Schools block allocation			
Guaranteed Unit of Funding	2022/23	2023/24	Change
Primary Unit of Funding (PUF)	£5,314.02	£5,491.85	£177.83
Secondary Unit of Funding(SUF)	£7,012.47	£7,401.58	£389.11
Numbers on roll (Oct 22)			
Primary Unit of Funding (PUF)	24,485.50	24,389.50	-96
Secondary Unit of Funding(SUF)	15,396.00	15,871.50	476
Total Primary school funding	£130,116,437	£133,943,476	3,827,039
Total Secondary school funding	£107,963,988	£117,474,177	9,510,189
Total pupil led funding	£238,080,425	£251,417,653	£13,337,228
Premises Factor	9,461,893	9,463,967	2,074
Growth Funding	1,423,064	1,565,576	142,512
Total Schools block before recoupment	248,965,383	262,447,196	13,481,813
Deductions for NNDR	4,736,789	4,739,398	2,609
Total schools funding after deduction before recoupment	244,228,594	257,707,798	13,479,204

Table: Schools block allocation 22/23 & 23/24

Recommendation (ii): Schools forum are requested to:

Note the updated DSG funding

2.5 Central Schools Services Block 2023/24 (CSSB)

2.6 The Central School Services Block allocates funding to LAs for “ongoing” and “Historic” responsibilities. Funding for on-going responsibilities is based on a pupil-led formula. The formula uses two factors: a basic per-pupil factor for all pupils through which LAs receive most of the funding (90%), and a deprivation per-pupil factor (10%). The pupil counts used to calculate CSSB allocations are LAs’ schools block pupil counts – that is, pupils in mainstream schools in year groups reception to year 11 inclusive, including pupils occupying places in special educational needs (SEN) units.

2.7 There has been a net reduction of £61k in the Central Schools block funding because of a reduction to the historic commitments of £118k which has been mitigated by an increase of £57k which is due to a higher pupil number of 376 and a small increase in the unit rate of £1.03.

	2020/21	2021/22	2022/23	2023/24	Movement
On-going responsibilities	1,439	1,620	1,631	1,688	57
Historic responsibilities	925	740	592	474	-118
	2,364	2,360	2,223	2,162	-61

2.8 The CSSB on-going budget for 2023/24 is used to fund the following service/functions on behalf of schools:

Service	2022/23	2023/24
Admission Service	648	671
Schools Forum	60	62
Copy right Licences	180	186
Statutory responsibilities	743	769
Total budget for ongoing resp.	1,631	1,688
School Improvement	55	44
Schools Estates	77	62
School Games Organiser	26	21
Trewern outdoor education	106	85
Community Music Service	158	126
Advisory Teachers	170	136
Total Historic Commitments	592	474
TOTAL CENTRAL SERVICES BLOCK	2,223	2,162

Table: Central Schools Services Block

2.9 In 2022-23 as in previous years beginning from 2021/22, the budget for CSSB historic commitments funding is being reduced 20% year-on-year. The annual reductions are set out in the table below.

Services	2020/21	2021/22	2022/23	2023/24	2024/25
a	b	c	d	e	f
School Improvement	86,000	68,800	55,040	44,032	35,226
Schools Estates	120,000	96,000	76,800	61,440	49,152
School Games Organiser	40,000	32,000	25,600	20,480	16,384
Trewern outdoor education	167,000	133,600	106,880	85,504	68,403
Community Music Service	248,000	198,400	158,720	126,976	101,581
Advisory Teachers	264,000	211,200	168,960	135,168	108,134
Total (historic)	925,000	740,000	592,000	473,600	378,880

Table – Impact of CSSB Historic funding reductions on services

2.10 The summary below shows how the services funded from the historic element of the CSSG is being remodelled to mitigate the 20% annual reductions:

- **School improvement** – the reductions are being offset by School Improvement contingency and reserves, the reductions will be absorbed by the school improvement service through rationalisation and service redesign.
- **Advisory Teachers** – this is part of BDSIP contract, and the savings have been passported as a reduction to the contract price.
- **Community Music Service** – the service has remodelled the delivery by entering into a service level agreement with schools.
- **Trewern outdoor education** – to mitigate the impact of the reductions, Trewern has been working on various service delivery options including remodelling of staff deployment, providing additional offers to schools to increase income and build-up of financial reserves.
- **School games organiser** – the reduction in DSG funding is being replaced by other grants such as the young Londoners Fund, Inspiring Futures, Sports England etc.
- **Schools' estates** – the reduction is being mitigated by capitalisation of eligible staffing costs that meets the criteria for capital funding, this is assign to the building of school assets.

Recommendation (iii): Schools forum are requested to:

(a) agree the proposed central spend line by line.

(b) note the reduction in historic funding element of CCSB and impact of this reduction.

3 Early Years Update

3.1 Department for Education (DfE) provides local authorities with 6 relevant funding streams which together form the early years block of the dedicated schools grant (DSG). They are:

- the universal 15 hours entitlement for all 3 and 4-year-olds
- the additional 15 hours entitlement for eligible working parents of 3 and 4-year-olds
- maintained nursery school (MNS) supplementary funding
- the 15 hours entitlement for disadvantaged 2-year-olds
- the disability access fund (DAF)
- the early years pupil premium (EYPP)

3.2 2023/24 EY funding rates for local authorities were announced in December 2022, The rates for 3&4 year olds are increasing by 6p to £6.01, and 2 year old rates are going up by 33p to £6.36. The early years estimated funding for 2023/24 is set out in the table below.

	Rate (£s)	PTE	Annual Entitle't (Hrs)	Funded Hours	Rates	Total Funding
	2022/23	2023/24	2023/24	2023/24	2023/24	2023/24
Universal Entitlement 3&4 Year Olds	5.95	4,253	570	2,424,324	6.01	14,570,325
Plus 15 PTE 3&4 YO	5.95	1,099	570	626,658	6.01	3,766,215
Total 3&4 YO EY Block						18,336,540
EY Pupil Premium	0.60	608.3	570	346,731	0.62	214,981
Disability Access Fund	800	138			828	114,264
						-
Entitlement 2 Y O	6.03	1,114	570	634,923	6.36	4,038,111
PROVISIONAL EY for 2022/23						22,703,896

Table – EY funding allocations for 2023/24

3.3 The budgeted distribution of funding is set out in the table below. In view of the cost pressures faced by the sector, we are proposing to passport the exact rate uplift by the DfE without any reduction by the local authority, in addition we are proposing to double the DfE rate increase for 3&4 year olds from 6p to 12p, this will cost additional £183k, this should be affordable given the consistent underspends on this block in previous years which is included in the DSG reserves.

TPPG has now been rolled into the Early Years base at the rate of 14 pence a hour. Last year we increased the base rate by an additional 8 pence above the increase from Central Government. We are proposing to add the remaining 6 pence an hour to the 3/4-year-old rate thus providing a total increase of 12 pence.

- the 3- and 4-year-old funded rates will therefore increase by 12p to £5.21p, this equates to 2.4% increase in the local funded rate. Since the recommended uplift for 3&4 year olds is less than that of 2 year olds, we will review the financial impact in the course of the year and if affordable, we will take action by recommending additional uplift around sept/oct for schools forum consideration.
- the 2-year-olds funded rates will increase by 33p to £6.09, this equates to 5.7% increase in the local funded rate.
- refer to **Appendix A** for benchmarking data for early years rates for other local authorities.

3.4 The budgeted distribution of funding is set out in the table below.

	Rate 2022/23	PTE 2023/24	Annual Entit'mt (Hrs) 2023/24	Funded Hours 2023/24	Rates 2023/24	Total Funding 2023/24
Central	897,475					910,049
Universal 3&4 YO	5.09	4,253	570	2,424,324	5.21	12,630,728
Plus 15 PTE 3& 4 YO	5.09	1,099	570	626,658	5.21	3,264,888
Deprivation	30p-22p				(30p-22p)	1,002,408
Flexibility	0.21				0.21	198,213
SEN Inclusion						377,761
Total 3&4 YO EY Block						18,384,047
EY Pupil Premium	0.60				0.62	214,981
Disability Access Fund	800				828	114,264
Entitlement 2 YO	5.76	1,114	570	634,923	6.09	3,866,682
Commissioning Costs						184,676
SEN inclusion fund						122,305
TOTAL EY BLOCK						22,886,955
Early Years Allocation						22,703,896
Variance - Deficit						£183,059

Table – Early Years provisional Budget for 2023/24

3.5 The early years funding requirements include the need to:

- set a single funding for universal and additional hours.
- pass on a minimum of 95% of the 3- & 4-year-old funding to providers
- use a universal base rate for all types of providers.
- use a deprivation supplement.
- not to channel more than 10% of their funding through supplements
- provide a Special Educational Needs Inclusion Fund (SENIF)
- pass on Early Years Pupil Premium (EYPP) in full to providers for eligible 3- and 4-year-olds
- pass on the Disability Access Fund (DAF)

3.6 The SEN Inclusion fund for early years is £378k and £122k for 3- and 4-year-olds and 2 years olds respectively. The total amount of £500k would be passported to settings by the local authority inclusion team.

- 3.7 In line with previous years, it is proposed that 5% of the 3- and 4-year-old funding is retained centrally to meet support and costs of early years provision. This is to fund home portage scheme (home visiting), early years teacher service (qualified teachers working with settings to raise standards, childminding development officer, and commissioning costs. (Please refer to table below for details.)

3 and 4 YO central Costs	2021/22	2022/23	2023/24
Childminding development Officers	73,546	70,742	71,733
Early Years Teachers Service	554,134	533,008	540,476
Home Portage Scheme	190,155	182,906	185,469
Targeted Support Central Costs DSG	115,211	110,819	112,372
Total	933,047	897,475	910,049

Table – Early Years centrally funded services

<p><u>Recommendation (iv):</u> Schools forum are requested to:</p> <p>(a) Note and comment on the Early Years funded hourly rates for 2023/24.</p> <p>(b) Approve the SEN Inclusion fund (refer to section 3.6).</p> <p>(c) Approve the Early Years Centrally funded services line by line (Refer to section 3.7)</p>
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4. National Funding Formula (NFF) - Indicative Funding 2023/24

- 4.1 The DFE has confirmed that it will move forward with the implementation of the NFF, whereby funding will be allocated directly to schools based on a single, national formula. 2023/24 is a transitional year and local authorities can continue to set a local schools funding formula. However, to ensure a smooth transition, LA's will be required to bring their formula closer to the NFF from 2023/24.
- 4.2 Provisional funding allocations announced in July 2022 indicates an increase in the total core school budget nationally by £7bn increasing to £56.8bn by 2024-25. Funding through the schools NFF is increasing by 1.9% overall in 2023-24, and 1.9% per pupil compared to 2022-23.
- 4.3 The main features in 2023-24 are:
- a) The schools supplementary grant which was introduced in 2022-23 to meet the cost of the Health and Social Care Levy will now be rolled into the schools NFF from 2023-24.
 - b) There will be additional support directed at disadvantaged pupils by the increase of the deprivation factors namely FSM6 and IDAC1. These factors will increase by 4.3% compared to 2022-23 values. 9.8% of the schools NFF will be allocated via the deprivation factors in 2023-24.

- c) The core factors in the schools NFF (basic entitlement & lump sum) will increase by 2.4%
- d) The minimum per pupil funding levels is set so every primary school pupil will receive at least £4,405 and every secondary school pupil at least £5,715.
- e) The funding floor is set at 0.5%. This is to ensure that all schools attract at least 0.5% more pupil led funding per pupil compared to 2022-23 NFF allocation. The funding floor baselines have also been increased to take account of the rolling in of the school's supplementary grant.
- f) Local authorities must use all the NFF factors except the locally determined premises factors.

4.4 LBBB has mirrored the NFF funding for all but one of the mandatory factors. The LA does not mirror the NFF basic entitlement. The guidance for 2023-24 is however to tighten the formula and move 10% or more closer to the NFF values. This will impact on the primary secondary ratio which in 2022-23 was kept as 1 to 1.35

4.5 The provisional NFF allocation for LBBB -Schools block is shown in the table below.

	2022-23	2023-24 July publication	2023-24 updated with census data
Pupil Nos*	39,882	39,882	40,269
Primary Unit of Funding (PUF)	£5,314	£5,492	£5,492
Secondary Unit of Funding (SUF)	£7,012	£7,402	£7,402
LA Allocation excluding growth & premises factors	£238,080,426	£248,425,369	£251,482,418
LA Allocation through premises funding	£9,461,893	£9,463,966	£9,463,967
LA supplementary grant (pupils 5-16)	£6,972,638	-	
Total SB baseline (excluding growth)	£254,514,957	£257,889,335	£260,946,385
Baseline per pupil (excluding growth)	£6,382	£6,466	£6,480
Provisional % change in 2023-24		1.33%	1.54%

Table – DFE provisional NFF allocation

4.6 **Appendix B** gives an overview of the funding model showing the movement in DSG allocation from 2022/23 to 2023/24, and **Appendix C** shows the indicative school level budget for 2023/24.

Recommendation (iv): Schools forum are requested to:

Note, comment and approve National Funding Formula – indicative school level funding 2023/24.

5. Mainstream Schools Additional Grant 2023/24

- 5.1 The DFE announced in the 2022 Autumn Statement that the core schools' budget will increase by £2 billion in the 2023 to 2024 financial year, over and above totals announced at the Spending Review 2021. In the 2023 to 2024 financial year, mainstream schools will be allocated additional funding through the mainstream school's additional grant (MSAG) 2023 to 2024. This is in addition to schools' allocations through the schools national funding formula.
- 5.2 LBBB has been allocated the sum of £8.487m (**Appendix D**) which is payable to the following providers for 5- to 16-year-olds:
- primary and secondary maintained schools
 - primary and secondary academies and free schools
 - all-through maintained schools
 - all-through academies
 - city technology colleges
- 5.3 The funding rates consists of 3 elements based on the schools national funding formula:
- A basic per pupil rate (with different rates for each key stage)
 - 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 meal at any point in the last six years (FSM6)
- 5.4 The same area cost adjustment has been applied to the funding that was applied to the National funding formula to take into account geographical variation in labour costs.
- 5.5 The LA will passport the money to the individual schools in 2023/24 in 2 tranches once payment is made by the DFE. It is expected the payments will be made to LA's in May 2023 and June for Academies to cover April – August 2023 and October 2023 for LA's and November 2023 for Academies to cover September 2023 to March 2024.

Recommendation (v): Schools forum are requested to:

Note mainstream school additional grant (MSAG) 2023/24

6. 22/23 Update on High Needs Projected Outturn

6.1 The projected outturn position for High Needs is an underspend of £750k. An allocation of £253k has been set aside for independent out of borough special schools for supplementary grant payments. The table below shows details of the outturn position.

	2021/22 Outturn	2022/23 Budget	2022/23 Outturn Forecast	Variance +surplus / (deficit)
Alternative Provision	3,150,015	3,437,983	3,336,232	101,751
ARP Funding	7,679,447	9,168,118	9,322,816	(154,697)
Education Inclusion	1,332,948	1,801,499	1,437,208	364,292
Out of Borough & Non-Maintained Funding	6,820,436	7,829,579	6,751,266	1,078,313
HN Top Ups – Post 16	3,003,921	2,180,000	2,100,694	79,306
SEN Panel Top Ups	1,762,327	1,500,000	3,288,258	(1,788,258)
LACHES, Lang. Support	317,440	350,234	315,685	34,548
Initiatives	313,076	688,593	688,593	0
Special School Funding	11,396,094	13,200,725	12,553,418	647,306
EY Portage & Youth Ser	412,798	578,362	623,609	(45,247)
Parent Support & Health	200,000	580,000	376,000	204,000
Total	36,388,502	41,315,093	40,793,779	521,314
Holding Cost & Gatekeeping	2,325,549	3,193,557	2,964,720	228,837
Total Budget	38,714,051	44,508,650	43,758,499	750,151

Table – High Needs Outturn

6.2 The projected outturn position for the DSG is forecasting an underspend of £750k. An allocation £253k has been set aside for independent out of borough special schools from the supplementary grant.

6.3 ARP funding forecast is reporting an overspend on both primary and secondary ARPs based upon numbers of pupils placed, inclusive of additional payments.

6.4 Out of Borough (OOB) payments and commissioned places is currently under review in accordance with total number of commissioned places and 'place-plus' cost however, based upon previous financial years expenditure from other local authorities and settings payment requests usually are processed at year end. The base budget was increased due to demand for SEN high needs suitable placements and forecast saving. This will change once the review has been completed.

- 6.5 Headteachers top-up panel met and due to demand and backlog of applications, this is forecasting an in-year pressure in the region of £1.788m, this will be supported from other budget area savings and gatekeeping or earmarked budget in support of High Needs pressures.
- 6.6 Forecast saving within Looked After Children and Education Services (LACHES) and Language support budget is forecasting a small saving.
- 6.7 Early Years and Youth budget is forecasting a small overspend within Early Years inclusive of one-off payment to nurseries and PVI settings for SEN pupils.
- 6.8 The Parent and Health budget at the moment is forecasting a saving but the small project within this budget is currently under further review and monitoring.
- 6.9 The High Needs working group met on 11th January 2023 and areas discussed were:
- Band F, G and H pupils in mainstream primary schools from the recent audit, including modelling of the `one-off` exceptional funding for 2022/23 in support, including early years nurseries & PVI settings
 - Proposed top up increments in support to Special schools and ARPs.
 - Headteacher panel top-up meeting and details of applications, including specific SEN areas identified.
 - SEN census from October 2022 and current EHC Plans including modelling of year 6 pupils in preparation of future place planning.
 - Update from ISP's and future targeted funding delegated to schools in support of the inclusion agenda.

Recommendation (vi): Schools forum are requested to:

Note and comment on the outturn forecast for High Needs Block for 2022/23.

7. High Needs Provisional Budget 2023/24

- 7.1 The total high needs block allocation for 2023/24 after deductions is **£50.936m**. There has been an increase of **£6.427m** from previous years allocation. The additional funding was confirmed by the DFE to support schools and special schools. Nationally the High Needs funding for 2023/24 saw an increase of £970m or 10.6% increase. LBBD has attracted an increase of 14%. refer to paragraph 5.10 for 2023-24 High Needs Budget details
- 7.2 Please refer to **Appendix E** for details of 2023/24 budget and 5years Budget trend including growth areas.

Recommendation (vii): Schools forum are requested to:

Note and comment on High Needs Provisional Budget 2023/24.

8. De-Delegation (Maintained Schools)

8.1 The 2022/23 and proposed 2023/24 de-delegation rates, for primary and secondary phases are set out in the tables below respectively. The updated figures are based on October 2022 census. The de-delegated amount is top sliced from LA maintained individual school budget share to fund the respective services.

	2022/23 Primary De-delegation			2023/24 Primary De-delegations			Movt
	Primary Pupil Nos	Unit Rate	Total Amount	Primary Pupil Nos	Unit Rate	Total Amount	
Contingencies	19,737	2.51	49,540	19,405	2.52	48,901	-639
LSCB	19,737	1.39	27,434	19,405	1.40	27,167	-267
Trade Union	19,737	8.37	165,199	19,405	8.40	163,002	-2,197
FSM Eligibility	19,737	0.84	16,579	19,405	0.84	16,300	-279
Sch. Improve.	19,737	2.81	55,461	19,405	5.06	98,189	42,728
Primary Total:	19,737	15.92	314,213	19,405	18.22	353,559	39,346

Table: Primary De-delegation Rates 2023/24

	2022/23 Primary De-delegation			2023/24 Primary De-delegations			Movt
	Secondary Pupil Nos	Unit Rate	Total Amount	Secondary Pupil Nos	Unit Rate	Total Amount	
Contingencies	10,044	2.51	25,210	10,265	2.52	25,868	657
LSCB Board	10,044	1.39	13,961	10,265	1.40	14,371	410
Trade Union	10,044	8.37	84,068	10,265	8.40	86,226	2,158
FSM Eligibility	10,044	0.84	8,437	10,265	0.84	8,623	186
Sch. Improve.	10,044	2.81	28,224	10,265	5.06	51,941	23,717
Secondary Total:	10,044	15.92	159,900	10,265	18.22	187,028	27,128

Table: Secondary De-delegation Rates 2023/24

8.2 Both academies and local authority-maintained schools benefit from the arrangements in respect of trade unions and local safeguarding board. Academies are to be invoiced as there is no provision to de-delegate. Table below presents the revised rates chargeable to academies.

	Total 2022/23	2023/24 Academy Charges (to be invoiced)							
		Primary NOR	Unit Rate	Primary Total:	Sec. NOR	Unit Rates	Sec. Total	Total 2023/24	Movt
LCSB	14,056	4,987	1.40	6,982	5,612	1.40	7,857	14,839	783
Trade Union	84,637	4,987	8.40	41,891	5,612	8.40	47,141	89,032	4,395
	98,693			48,873			54,998	103,870	5,177

Table: Charges to Academies 2023/24

	22/23 Total De-del.	23/24 Total De-del.	22/23 Academy Invoiced	23/24 Academy Invoiced	2022/23 Total	2023/24 Total	Movement
Contingencies	74,750	74,768	-	-	74750	74,768	18
LSCB	41,396	41,538	14,056	14,839	55452	56,377	925
Trade Union	249,267	249,228	84,637	89,032	333904	338,260	4,356
FSM Elig.	25,016	24,923	-	-	25016	24,923	-93
Sch. Improv	83,685	150,130	-	-	83685	150,130	66,445
Total	474,114	540,587	98,693	103,870	572,807	644,458	71,651

Total De-delegation and amounts to fund the different services

Recommendation (xiii): Schools forum are requested to:

- (a). Approve by phase (maintained schools only) and line by line delegation rates and amounts (Section 8.1)
- (b). Note rates to be used for billing academies (section 8.2)

9.0 Growth Fund for 2023/24

9.1 Growth funding is allocated to Schools to manage an increase in pupil numbers in 2023-24 before the lagged funding catches up. The DFE allocate growth funding based on the differences between primary and secondary pupils at school within each Middle Layer Super Output Area (MSOA) between the October 2021 and October 2022 census figures. Only positive MSOA growth will be used in calculating the number of pupils to be funded. The criteria set by LBBB for the growth fund is as below:

- 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.

9.2 The 2023/24 DFE growth fund allocation is **£1.576m** and the revised growth required is **£1.417m**. There is a surplus allocation of £148,493 which is proposed to school's forum to put towards the falling rolls fund for 2023/24.

The table below sets out the provisional growth allocation for 2023/24 based on the planned admission numbers in September 2023. There are 4 schools currently qualifying for growth fund allocation next year (2 primaries, 1 secondary and 1 all-through). The primary and secondary phases are reporting growths of 129 and 270 respectively. The total cost of funding growth is £1.417m which includes £279k of pupil-led premium uplift. The DFE allocation is £1.565m leaving a surplus of £148k.

It is recommended that the surplus growth fund to be used in part to fund the falling rolls fund.

School	Prim. Growth	Sec. Growth	Prim. AWPU	Sec. AWPU	40% Uplift	Budget
			£4,015	£5,307		
Beam Primary	9		£21,079			£21,079
Greatfields (Free School)		90	£0	£278,617		£278,617
Riverside Primary (Free School)	60		£140,525	-		£140,525
Robert Clack School of Science	60	180	£140,525	£557,234	£279,104	£976,863
Total	129	270	£302,128	£841,158	£279,104	£1,417,083
Surplus growth fund						£148,493
Growth Fund Allocation (DFE)						£1,565,576

Table - 2023/24 Updated Expansions and Growth Fund Requirements

Recommendation (ix): School Forum are requested to:

- (a) Note, comment and approve proposed growth funding for 2023/24.
- (b) approve surplus growth fund to be used to partly fund falling rolls.

10. Falling Rolls Fund 2023/24

10.1 Local authorities may set aside schools block funding 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 3 financial year.

10.2 To be eligible for falling rolls, schools must meet several qualifying criteria.

- It is a DfE mandatory requirement that the school must be good or outstanding.

Other requirements previously agreed by the Forum are:

- The school must have a reduction of 10 or more pupils after adjusting for impact of bulge classes.
- There must be a year-on-year reduction in delegated budget.
- The school's reserves do not exceed 10% of delegated budget.

10.3 **Appendix F** sets out the movement in pupil numbers in October 2022 when compared to the October 2021 census. LBBB schools have seen a net growth in overall pupil numbers of 376. However, a total of 27 schools have seen a combined drop in numbers on roll of 72. Majority of schools impacted are in the primary sector with 24 primary schools seeing a drop in pupil numbers. 2 secondary schools and 1 all through school have also seen a fall in numbers.

Phase	Oct 2021 NOR Pri	Oct 2021 NOR Sec	Oct 2022 NOR Pri	Oct 2022 NOR Sec	Primary Movement	Secondary Movement	Net
All-through	1,663	6,701	1,738	6,904	75	203	278
Secondary	-	8,728	-	8,973	-	245	245
Primary	22,801	-	22,654	-	(147)	-	147
	24,464	15,429	24,392	15,877	(72)	448	376

10.4 Based on the numbers of pupils on roll at the October 2022 census when compared to the October 2021, the schools listed below met the set criteria. The estimated falling rolls fund required is £482k.

School	Fall in NOR	Falling Rolls 2023-24 - qualifying schools
Valence Primary School	-49	90,498
Marsh Green Primary School	-45	82,966
Richard Alibon Primary School with ARP for Cognitive and Learning Difficulties : SEN Base	-31	57,254
Roding Primary School	-27	49,866
Northbury Primary School	-18	33,244
William Ford CofE Junior School	-18	33,244
William Bellamy Primary School	-16	29,550
St Joseph's Catholic Primary School	-15	27,703
St Joseph's Catholic Primary School	-15	27,703
Gascoigne Primary School	-13	24,010
Jo Richardson Community School	-10	26,022
		482,061

Table: Falling rolls allocation for 2023/24

Recommendation (x): School Forum are requested to:

Approve falling rolls fund for 2023/24 to be jointly funded from surplus of Growth fund and DSG reserves (£148,493 & £333,568) respectively.

11. Review of Trade Union Facility time

- 11.1 The local authority HR team have commissioned a review of trade union facility time, de-delegation rates, and contributions by academy schools. The draft report is being consulted with all parties before submitting to schools forum for approval.
- 11.2 We are therefore proposing to maintain the current arrangements for 2022/23 financial year until the report is finalised and recommendations for future years are determined.

Recommendation (xi): Schools forum are requested to:

Note the update on proposed review of trade union facility time.

12. AOB

13 Financial implications

As presented in this document.

14 Legal implications

The schools' forums (England) regulations 2012 govern the constitution and conduct of meetings of the forum. The schools finance (England) regulations 2012 determine those matters on which the local authority must or may consult the school's forum and those in respect of which the schools forum can make decisions. These regulations make provision for the financial arrangements of local authorities in relation to the funding of maintained schools and providers of prescribed Early Years provision in England.

15 Other implications

- a. **Risk management** - None
- b. **Contractual issues** - None
- c. **Staffing issues** – None
- d. **Customer impact** – None
- e. **Safeguarding children** - None
- f. **Health Issues** - None
- g. **Crime and Disorder Issues** – None

h. Property / Asset Issues – None

Background papers used in the preparation of the report:

None.

List of appendices:

Appendix A _Benchmarking data for EY

Appendix B_ Overview of funding model

Appendix C_ Provisional ISB allocations for 2023/24

Appendix D_ Mainstream Schools Additional Grant 2023/24

Appendix E_ High Needs Budget setting 2023/24 plus 5 years Trend

Appendix F_ Falling Rolls