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Blackpool Council

9 January 2023

To: Councillors Baines, Benson, Casson, Dickinson, Sycamore, Thompson, Turner and Wood

The above members are requested to attend the:

SCHOOLS FORUM

Tuesday, 17 January 2023 at 9.15 am
in @the Grange, Bathurst Avenue, FY3 7RW

A G E N D A

1 DECLARATIONS OF INTEREST

Members are asked to declare any interests in the items under consideration and in doing so state:

(1) the type of interest concerned either a

- (a) personal interest
- (b) prejudicial interest
- (c) disclosable pecuniary interest (DPI)

and

(2) the nature of the interest concerned

If any member requires advice on declarations of interests, they are advised to contact the Head of Democratic Governance in advance of the meeting.

2 MINUTES OF THE LAST MEETING HELD ON 11 OCTOBER 2022 (Pages 1 - 8)

To agree the minutes of the last meeting held on 11 October 2022 as a true and correct record.

3 ELECTION OF VICE CHAIR

To elect a Vice-Chair of the Schools Forum.

4 DEDICATED SCHOOLS GRANT BUDGET MONITORING (Pages 9 - 14)

To report the budget position of the 2022-23 Dedicated Schools Grant as at 30 November 2022 and to report the amount of Dedicated Schools Grant Reserves Forecast as at 30 November 2022.

5 LOCAL AUTHORITY UPDATE (Pages 15 - 18)

To provide an overview of recent developments within the local authority to the Forum.

6 SAFETY VALVE PROPOSALS (Pages 19 - 26)

To seek sign-off by Schools Forum of the proposals to be submitted to the Department for Education under the Safety Valve programme.

7 DEDICATED SCHOOLS GRANT BUDGET 2023/2024 (Pages 27 - 32)

To share with Schools Forum the proposals for the use of Dedicated Schools Grant (DSG) in 2023/24.

8 SCHOOL FUNDING FORMULA 2023/24 (Pages 33 - 40)

To consider the local authority's proposals for the allocation of schools funding in 2023/24.

9 DE-DELEGATION OF SERVICES (Pages 41 - 48)

Approval is sought for the de-delegation of services and the retention of funding for Education Functions.

10 DATE OF NEXT MEETING

To note the next meeting date as 7 March 2023.

Venue information:

First floor meeting room (lift available), accessible toilets (ground floor), no-smoking building.

Other information:

For queries regarding this agenda please contact Tyrone Wassell, Democratic Governance Adviser, Tel: 01253 477202, e-mail danielle.bowater@blackpool.gov.uk

Copies of agendas and minutes of Council and committee meetings are available on the Council's website at www.blackpool.gov.uk.

Public Document Pack Agenda Item 2

MINUTES OF SCHOOLS FORUM MEETING - TUESDAY, 11 OCTOBER 2022

Present:

Maintained Primary School Headteachers/representative

Elaine Allen, St John Vianney

Claire Taylor, St Nicholas

Maintained Primary School Governor

Michelle Lonican, Our Lady of the Assumption

Maintained Special School Representative

Neill Oldham, Highfurlong

Special Academy/Free Schools Representative

Gill Hughes, Park Community Academy

Academy/Free School Representatives

Abrar Hussain, Highfield (Star)

Graeme Dow, Anchorsholme (Sea View)

Roger Farley, Westminster (FCAT)

Simon Eccles, St Mary's (BEBCM!T)

Tracy Harrison, Thames / Roseacre (ATC)

Matt McIver, St George's / Baines Endowed (Cidari)

Pupil Referral Unit

Victoria O'Farrell, Educational Diversity

Non-schools members

Neil Adams, Unison

Amanda Baines, Staff/Teacher associations

Jill Gray – Post 16, Blackpool Sixth Form

In Attendance:

Sarah Chadwick, Democratic Governance Advisor (minutes)

Paul Turner, Assistant Director of Children's Service

Hilary Wood, Head of School Finance and Funding

Darren Maddocks, Strategic Accountant

Steve Barnard, DfE Local Authority Stakeholder Engagement Team (observing)

1 WELCOME, INTRODUCTIONS AND APOLOGIES

Attendees were welcomed to the meeting by Hilary Wood, Head of School Finance and Funding, prior to the election of the Chair at item 3.

Apologies for absence were received from Councillor Gillian Campbell (Cabinet Member for Inclusion, Youth, Schools and Transience), Mark Golden (Head of Accountancy, Deputy S151 Officer), Charlotte Baron (Head of SEND) and Victoria Gent (Head of Children's Services).

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It was noted that an observer from the Department for Education's Local Authority Stakeholder Engagement Team, Steve Barnard, was in attendance at the meeting.

2 DECLARATIONS OF INTEREST

There were no declarations of interest.

3 ELECTION OF CHAIR

The Forum considered the election of a Chair of the Schools Forum until August 2023.

Resolved:

To elect Roger Farley (Westminster (FCAT) Academy School Representative) as Chair of the Schools Forum until August 2023.

4 ELECTION OF VICE CHAIR

Having been elected, Roger Farley took the role of Chair for the remainder of the meeting. The Forum considered the election of a Vice Chair of the Schools Forum until August 2023.

Resolved:

To defer the election of a Vice Chair to the next meeting.

5 POWERS, RESPONSIBILITIES AND GOOD PRACTICE OF SCHOOLS FORUMS

Hilary Wood, Head of School Finance and Funding, presented the report which reminded members of the powers and responsibilities of Schools Forums. There had been no changes since the previous year however the report was presented as an annual reminder of those areas which the Schools Forum could decide upon and those which remained as local authority decisions on which the Forum was consulted.

It was recognised that to be an effective partnership between the local authority and the parties involved in Blackpool's education system the Forum had to work collaboratively, providing challenge and scrutiny where appropriate and that openness and honesty were key.

6 MINUTES OF THE LAST MEETING HELD ON 14 JUNE 2022

The minutes of the last meeting held on 14 June 2022 were agreed as an accurate record.

Matters arising:

- Family Support Worker in Schools model – Paul Turner reported that progress had been made with discussions around this and it was hoped that information would be circulated to schools after the half term break.

All other matters arising had either been completed or were covered elsewhere on the agenda.

7 HIGH NEEDS UPDATE

In a change to the order of items on the agenda, the Forum agreed to bring forward agenda item 10 – High Needs Update and agenda item 11 – Schools Funding Formula so that those members who had requested to leave the meeting early due to a prior commitment were present to vote on the latter of those items.

Hilary Wood, Head of School Finance and Funding, updated members on the latest developments in relation to the High Needs budget.

Medium Term Financial Plan

The Forum was reminded of the financial pressures previously reported that were being experienced by Blackpool. The medium term financial plan had been updated to incorporate assumptions on inflationary impact in line with advice from the Education and Skills Funding Agency and it had been assumed that an ongoing 0.5% transfer from the Schools Block would continue to be required. Forecasted costs were again above High Needs income with an estimated overspend of £179k although a net repayment of approximately £800k brought about by transfers from other Dedicated Schools Grant (DSG) blocks would reduce the cumulative deficit to around £4.157m by March 2023.

In response to a question regarding who was responsible for the deficit, Ms Wood explained that current government regulations meant that local authorities were not required to cover it from their own resources and that it was offset by maintained schools balances which covered the deficit. That arrangement was due to end in March 2023 and as there was no indication yet as to whether it would be extended, no action was currently required until the position was clearer.

Safety Valve Programme

Blackpool was moving ahead with participation in the Department for Education's (DfE) Safety Valve Programme and Ms Wood highlighted the expectations of that programme as set out in her report. The first formal meeting between the DfE Safety Valve Team and Blackpool Council had taken place on 3 October 2022 and following a 20 minute presentation it was reported that feedback was positive with the DfE expressing confidence in the authority's draft Management Plan.

The mitigations and forecasted savings included in the Management Plan were highlighted, although the Forum was advised that the Plan would likely be modified following further scrutiny by the DfE. It was suggested that it would be useful for Forum members to receive further details around the numbers to provide more context as to headline mitigations. The refined Management Plan was due to be submitted to the DfE by 13 January 2023 following which it would need to be considered by the Council's Executive with the final proposals submitted by 3 February 2023.

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In response to a suggestion from the Chair, Ms Wood agreed to arrange a meeting of the High Needs Funding sub-group in early November to allow interested Forum members to have a more detailed conversation about plans to manage the DSG deficit as part of the DfE's Safety Valve programme.

Action: Hilary Wood to circulate a proposed meeting date for the High Needs Funding Sub-Group to meet in early November and for Forum members to be invited should they be interested in attending.

8 SCHOOLS FUNDING FORMULA 2023/24

[Elaine Allen joined the meeting prior to consideration of this item.]

Hilary Wood, Head of School Finance and Funding, presented her report which outlined the local authority's proposals for the allocation of schools funding in 2023/24.

The provisional settlement had been announced by the DfE in July 2022. The majority of National Funding Formula (NFF) factors values would increase by approximately 2.4%, with the Ever6 free school meals and Income Deprivation Affecting Children Index (IDACI) factors increasing by 4.3%. The funding floor used in the national formula was to be set at 0.5% in 2023/24 meaning that all schools' NFF allocations would see a minimum gain per pupil of 0.5%. This was considered low in the face of the current economic climate and represented a reduction to the funding floor that had been set at 2% in recent years.

The Blackpool Schools Block allocation was likely to increase by approximately £2.4m, or 2.36% per pupil, compared to 2022/23 with the government maintaining its commitment to provide additional funding to Blackpool schools.

The Forum had previously agreed to mirror Blackpool's school funding formula with that of the National Funding Formula and it was therefore asked to agree a minimum funding guarantee of 0.5% per pupil in accordance with the NFF funding floor. A consultation had taken place in September 2022 to seek views on the proposal to transfer 0.5% from the Schools Block to the High Needs Block in 2023/24 by way of a reduction to the Basic Entitlement. 70% of those that had responded supported the proposal, with the views noted of those who had expressed concerns.

The Forum considered the local authority's proposals for the allocation of school funding in 2023/24 and following a vote the recommendations were agreed.

Resolved:

1. Following a vote by school and early years representatives in attendance, to support to the local authority's proposals for the allocation of school funding in 2023/24 by applying the following principles:

- **Continue to apply the National Funding Formula (NFF) unit values;**
- **Set a minimum funding guarantee of 0.5% per pupil funding;**
- **Transfer any surplus from the growth funding allocation into the growth funding contingency.**

2. Following a vote by the Schools Forum as a whole, to approve the transfer of 0.5% from the Schools Block to the High Needs Block in 2023/24 by way of a reduction to the Basic Entitlement

[Neill Oldham, Claire Taylor and Victoria O'Farrell left the meeting at the conclusion of this item.]

9 REVIEW OF SCHOOLS FORUM MEMBERSHIP AND CONSTITUTION

Hilary Wood, Head of School Finance and Funding, presented the report and explained that an annual review of the membership of the Schools Forum was required in accordance with the constitution. That review should take into account the balance of primary, secondary and academy representatives to ensure that the proportions remained representative of pupil numbers. The final decision on membership remained with the local authority however the Forum was consulted on its views and recommendations.

It was noted that there had been a slight change to the proportions following the conversion of St Teresa's and St Kentigern's Catholic Primary schools to academies. As the resultant change had been marginal it was proposed by the authority that the existing balance was maintained with a further review due in September 2023 following the expiry of the current membership by which time it was expected that further academy conversions would have taken place.

No changes were proposed to the Schools Forum Constitution or Terms of Reference.

Following a brief discussion the Forum agreed to recommend that the local authority retained the existing balance of representatives between maintained primary and academy mainstream schools. It further agreed to support the continuation of arrangements in relation to provisions in the Constitution in respect of numbers of representatives from any federation, multi-academy trust or academy sponsor.

10 LOCAL AUTHORITY UPDATE

Paul Turner, Assistant Director of Children's Services, presented the report which provided an overview of recent developments within the local authority since the last meeting.

Discussion took place in regards to school attendance figures. It was noted that college attendance figures had not been provided and Mr Turner explained that those figures were difficult to calculate. Representatives from post-16 education providers added that differences in recording attendance data, such as in respect of free periods when pupils could study elsewhere, meant the figures were not comparable. In response to a suggestion from the Chair, Mr Turner agreed to collate attendance figures from each college to provide the data individually for the next meeting.

It was reported that exclusion and suspension numbers were currently relatively high, with approximately 10 permanent exclusions already in the first half term of the new academic year. If those numbers were maintained it would result in around 60 exclusions

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in the whole year which could lead to a significant change in the High Needs and Pupil Referral Unit figures. It was noted that permanent exclusions did not often take place in primaries however Mr Turner agreed to bring figures in relation to primary fixed term exclusions to the next meeting.

The Forum discussed the cost of exclusions. Hilary Wood summarised the regulations for exclusions charges which applied to mainstream schools, explaining that the amount was pro-rated to the end of the school year, reducing as the year progressed. The system was complex and Ms Wood therefore agreed to share information with secondary colleagues as to how it worked. The Forum considered that it may be beneficial for a working party to be convened to discuss the issue in depth. On further discussion, and to avoid duplication, it was suggested by Simon Eccles, St Mary's, and agreed by the Forum, that an initial discussion on the matter should take place at the next scheduled meeting of secondary heads at 3pm on 16 November to which it was agreed to invite Ms Wood and any other interested parties not already invited.

Elective Home Education figures had increased, as they had nationally, particularly in years 10 and 11. Mr Turner advised the Forum that should all those children who were currently being educated at home return to school, there would be an insufficient number of school places to accommodate them all.

Actions:

- **Paul Turner to collate attendance figures from each post - 16 setting to provide the data individually for the next meeting.**
- **Paul Turner to bring figures in relation to fixed term exclusions within the primary sector to the next meeting.**
- **Simon Eccles to invite Hilary Wood to the secondary heads meeting on 16 November 2022 at 3pm.**

11 DEDICATED SCHOOLS GRANT BUDGET MONITORING 2022-2023

Darren Maddocks, Strategic Accountant, reported on the budget position of the 2022-23 Dedicated Schools Grant (DSG) as at 31 August 2022.

Budget monitoring had forecasted a £809k underspend against the DSG, a variance of £800k to plan, with major in-year variances highlighted as per the report. In relation to reserves, the forecasted £809k surplus would reduce the brought forward deficit of £4.956m to £4.147m by the end of March 2023 (excluding the maintained schools reserves of £4.129m). This was currently considered to be realistic in terms of budget expectations.

Questions and comments were invited. Discussion took place in regards to variances in the budget, including for the Pupil Referral Unit. It was noted that high transience figures was an issue and that there were currently a high number of asylum seekers needing school places in addition to those with English as a second language and those with SEND requirements. It was remarked that going forwards, it would be difficult to predict the pressure on places for such needs.

12 DIRECT NATIONAL FUNDING FORMULA FOR SCHOOLS

Hilary Wood, Head of School Finance and Funding, updated Forum members on the DfE's consultation on implementing the direct National Funding Formula (NFF).

The methodology for allocating funding to schools varied to an extent across local authorities and the direct NFF aimed to bring those methodologies closer together. The local formula adopted by Blackpool already closely mirrored the NFF, therefore it was not anticipated that there would be major changes for its schools and academies.

It was intended that the direct NFF would be implemented by 2027/28 with progress towards that target date being made at a manageable rate. Transfers from the Schools Block to the High Needs Block would continue to be allowed via a new application process and the national formula would retain the principle of notional SEN budgets.

Two options were offered in the consultation around funding for growing schools: a national formula for allocating funding directly to schools that had been experiencing significant increases in pupil numbers and an allocation of funding to local authorities to exercise local discretion on the use of available funding, the latter being the DfE's preferred option.

The NFF would incorporate a split site factor from 2024/25 with a basic element determined by whether the sites were separated by a road or railway and an element based on distance between sites. The direct NFF would retain year-on-year protection by way of a Minimum Funding Guarantee in order to avoid significant reductions in funding per pupil.

There were no questions following the report and Hilary Wood was thanked for the update.

13 EARLY YEARS NATIONAL FUNDING FORMULA CONSULTATION

Hilary Wood, Head of School Finance and Funding, presented her report which provided an update on the DfE consultation on Early Years Funding Formulae which had closed on 16 September 2022.

The datasets which underpinned the formulae had not been reviewed for some time and the consultation proposed to update the formulae for the 2023/24 financial year and annually thereafter, resulting in some changes to local authority funding levels. Forum members were advised of the proposed changes to the Early Years National Funding Formula and the 2-year old funding formula as highlighted in the report.

14 DATE OF NEXT MEETING

The date of the next meeting was noted as 17 January 2023.

Chairman

(The meeting ended 10.37 am)

Any queries regarding these minutes, please contact:
Sarah Chadwick Democratic Governance Senior Adviser
Tel: 01253 477153
E-mail: sarah.chadwick@blackpool.gov.uk

Report to: **SCHOOLS FORUM**
Relevant Officer: Darren Maddocks, Strategic Management Accountant
Date of Meeting: 17 January 2023

DEDICATED SCHOOLS GRANT BUDGET MONITORING 2022-2023

1.0 Purpose of the report:

- 1.1 To report the budget position of the 2022-23 Dedicated Schools Grant as at 30 November 2022 - Appendix 4a.
- 1.2 To report the amount of Dedicated Schools Grant Reserves Forecast as at 30 November 2022 – Appendix 4b.
- 1.3 Action required:
 - For information

2.0 Recommendation:

- 2.1 To note contents of the report.

3.0 Background:

- 3.1 The monitoring report at Appendix 4a reflects the budgets as approved at the March 2022 Schools Forum.
- 3.2 Budget monitoring to the end of November 2022 is forecasting a £392k under spend against a budgeted under spend of £1,609k, a variance of £1,217k to plan.
- 3.3 The major in-year variances are as follows:
 - Out of Borough placements demand higher than budget of £319k.
 - Special School placements pressure of £238k.
 - Resource provision pressure of £159k relating to additional pupils at Marton and Thames.
 - Post 16 Education placements pressure of £134k.
 - Mainstream Top-up pressure of £200k.

3.4 Reserves

The statement of forecast reserves is set out at Appendix 4b to this report. Budget monitoring for the 2022/23 Financial Year is forecasting a £392k surplus which will reduce the brought forward deficit of £4.956m to £4.564m by 31st March 2023. This excludes the maintained schools reserves of £4.129m.

4.0 ListofAppendices

4.1 Appendix 4a - Dedicated Schools Grant 2022-2023 Budget Monitoring Report to 30 November 2022.

Appendix 4b - Dedicated Schools Grant Reserves Forecast as at 30 November 2022.

ListofAcronyms :

DSG	-	Dedicated Schools Grant
LA	-	Local Authority
HNB	-	High Needs Block
SSA	-	Special Support Assistant
ESFA	-	Education and Skills Funding Agency
SERF	-	Special Education Referral Unit
PRU	-	Pupil Referral Unit

**Appendix 4a - DedicatedSchoolsGrant2022 -2022BudgetMonitoringReportto30
November2022**

Service	2022/23						Comments
	Budget	In Year Adj.	Recoupment	Adjusted Budget	Forecast Outturn	Variance	
	£000s	£000s	£000s	£000s	£000s	£000s	
Schools Block							
Local School Budget							
- Delegated	98,179	0	(78,586)	19,593	19,593	0	
- Third Party & Public Liability Insurance (de-delegated)	0	0	0	0	0	0	
- Union Duties (de-delegated)	19	0	0	19	19	0	
- Free School Meals Eligibility Checks (de-delegated)	19	0	0	19	19	0	
School Improvement	25	0	0	25	25	0	
- Education Functions (retained)	166	0	0	166	166	0	
Business Rates	6	0	0	6	6	0	
Pupil Growth Contingency	0	0	0	0	0	0	
	98,414	0	(78,586)	19,828	19,828	0	
Central School Services Block							
Servicing of Schools Forum	18	0	0	18	18	0	
Licences & Subscriptions	93	0	0	93	93	0	
School Admissions	168	0	0	168	168	0	
Contribution to Combined Budgets - Children's Centres	0	0	0	0	0	0	
Former ESG Retained Duties							
- Education Welfare	235	0	0	235	235	0	
- Asset Management	68	0	0	68	68	0	
- Statutory / Regulatory Duties	101	0	0	101	101	0	
Equal Pay	0	0	0	0	0	0	
	683	0	0	683	683	0	
Total Schools Block	99,097	0	(78,586)	20,511	20,511	0	
High Needs Block							
Special Schools							
Place Funding	5,894	0	(3,446)	2,448	2,567	119	Includes Uplift - 3.5%
Top-up Funding	4,529	42	0	4,571	4,690	119	Includes Uplift - 3.5%
SERFs							
Place Funding	0	0	0	0	0	0	
Top-up Funding	0	0	0	0	0	0	
Transport	0	0	0	0	0	0	
Resource Provision							
Place Funding	519	0	(319)	200	270	70	Additional pupils @ Marton & Thames
Top-up Funding	530	0	(0)	530	619	89	Additional pupils @ Marton & Thames
Pupil Referral Units							
Place Funding	1,850	0	0	1,850	1,850	0	
Top-up Funding	1,252	0	0	1,252	1,252	0	
Other AP	100	0	0	100	148	48	Additional Capacity Other Settings
Mainstream Schools							
Top-up Funding	2,479	24	0	2,503	2,703	200	Based on pupil numbers in Management Plan + Element 3 Payments
Exceptional Circumstances Funding	165	0	0	165	158	(7)	Latest forecast
Post-16 Education	2,860	24	(1,150)	1,734	1,868	134	Based on pupil numbers in Management Plan
Out of Borough	4,760	12	0	4,772	5,091	319	Based on pupil numbers in Management Plan
Specialist Advisory and Referral Service (SARS)	1,531	0	0	1,531	1,536	5	
Access and Inclusion	1,414	(30)	0	1,384	1,414	30	Early Years budget transfer
Other High Needs Central Services (Management, Central Support Costs, Admin Support, Pension Top-slice)	772	0	0	772	772	0	
Total High Needs Block	28,655	72	(4,915)	23,812	24,938	1,126	
Early Years Block							
2 Year Old Grants	1,500	0	0	1,500	1,493	(7)	
Early Years Pupil Premium	100	0	0	100	100	0	
3 & 4 Year Old Grants	6,578	0	0	6,578	6,656	78	Difference on 21/22 Year end Adjustment
Early Years Inclusion Fund	60	30	0	90	90	0	
Disability Access Fund	70	0	0	70	70	0	
Early Years Central Services	341	0	0	341	351	10	Pay Award higher than forecast
Total Early Years Block	8,649	30	0	8,679	8,760	81	
Total Expenditure	136,401	102	(83,501)	53,002	54,209	1,207	
Dedicated Schools Grant Income	(137,870)	(102)	83,461	(54,511)	(54,511)	0	
ESFA Free School Income	(49)	39	0	(10)	0	10	Included in Special School Line
Transfer from growth contingency	(90)	0	0	(90)	(90)	0	
Total Income	(138,009)	(63)	83,461	(54,611)	(54,601)	10	
In year (under)/over spend	(1,608)	39	(40)	(1,609)	(392)	1,217	

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Appendix 4b - DedicatedSchoolsGrantReservesForecastasat30November2022

Description	Brought Forward 1st April 2022	Total Forecast Expenditure FY 2022-23	Forecast Surplus / (Deficit) at 31st March 2023	Comments
DSG Reserve	(4,956,235)	(392,000)	(4,564,235)	
Maintained School Balances	4,129,370	0	4,129,370	
	(826,865)	(392,000)	(434,865)	

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Report to: **SCHOOLS FORUM**
Relevant Officer: Paul Turner, Assistant Director
Date of Meeting: 17 January 2022

LOCAL AUTHORITY UPDATE

1.0 Purpose of the report:

- 1.1 To provide an overview of recent developments within the local authority to the Forum.
- 1.2 Action required:
 - For information

2.0 Recommendation(s):

- 2.1 This report is presented for information only.

3.0 Background Information

The focus for School Forum is inclusion, linked to High Needs spending. The data below gives an insight into current performance and developments within the Blackpool school system. Additional updates on staffing, Ofsted inspections and local educational developments are included.

3.1 Inclusion summary data and updates

Attendance

Primary 6.34% / 21.96% (OA and PA)
Secondary 11.04% / 35.61% (OA and PA)
Special 8.22% / 23.39% (OA and PA)
6th form TBC
Pupil Referral Unit 49.02% / 88.81% (OA and PA)

Exclusions and suspension

759 suspensions in the secondary academies
13 Permanent Exclusions

PupilReferralUnit numbers

116 Pupils on roll
 59 pupils single-roll on 22 November 2022
 45 pupils in Y11
 26 pupils in Y10

On Roll	ATHENA (MEDICAL / HOSP)			HHM (HOME TUTION)			PEGASUS KS2 / KS3			PEGASUS KS4			SPECIALIST			CHRYSLIS			TOTALS
	School Refs	Council Refs	Single Reg	School Refs	Council Refs	Single Reg	School Refs	Council Refs	Single Reg	School Refs	Council Refs	Single Reg	School Refs	Council Refs	Single Reg	School Refs	Council Refs	Single Reg	
Yr 11	1	23 (1)	5		2					1	6	6		12 (2)	11				45 (3)
Yr 10	2	11	7		1						11	9		1	1				26
Yr 9		5 (1)	2		1		1	7	6								7		21 (1)
Yr 8	1	3	3					7	5								1		12
Yr 7								3	1										3
Yr 6								1											1
Yr 5					1		1	3	3										5
Yr 4							1												1
Yr 3							2												2
Yr 2																			
R / Yr 1																			
TOTAL	4	42 (2)	17	0	5	0	5	21	15	1	17	15	0	13 (2)	12	8	0	0	116 (4)

ElectiveHomeEducation

365 pupils on Elective Home Education as at 22 November 2022.
 74 in Y10 and 99 in Y11.

Ofstedinspections

Boundary – Good
 St Nicholas – Outstanding
 Blackpool Football Club – Requires Improvement

LocalAuthoritystaffingupdates

Gillian Evan is the new assessment and moderation advisor.

Listofacronyms:

EHE – ElectiveHomeEducation

PRU – PupilReferralUnit

ListofAppendices:
None.

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Report to: **SCHOOLS FORUM**
Relevant Officer: Hilary Wood, Head of School Finance and Funding
Date of Meeting: 17 January 2023

SAFETY VALVE PROPOSALS

1.0 Purpose of the report:

1.1 To seek sign-off by Schools Forum of the proposals to be submitted to the Department for Education under the Safety Valve programme.

1.2 Action required – for consultation (local authority decision).

2.0 Recommendation(s):

2.1 To support the proposals.

3.0 Background Information

3.1 As reported in previous meetings, Blackpool, along with many other areas around the country, is experiencing financial pressures on its High Needs Budget. Additional government funding in recent years has helped to offset some of these pressures, however costs in 2021/22 exceeded the High Needs funding allocation by £2.374 million. Transfers from other funding blocks, together with the release of the new and growing schools provision, combined to offset pressures, with the cumulative deficit against Dedicated Schools Grant (DSG) reducing by £805k to £4.957 million at the end of March 2022.

3.2 Despite a substantial uplift in High Needs funding for 2022/23, emerging pressures mean that forecast costs are once again out-stripping income, with an estimated overspend of £544k for the year. However, approved transfers from other DSG blocks look set to bring about a net repayment of £393k, reducing the cumulative deficit to an estimated £4.564 million by March 2023.

3.3 As previously discussed, Blackpool is now included in the Department for Education's (DfE) Safety Valve programme for those local authorities with the highest percentage DSG deficits. The programme requires those local authorities to develop plans for reform to their high needs systems and associated spending, with support and challenge from the DfE, to rapidly place them on a sustainable footing. The authorities are held to account for their reform and savings via regular reporting to the DfE. The DfE in turn helps the local authorities with additional funding over time to contribute to their historic deficits, contingent on delivery of the reforms. Capital funding can also be made available to support the creation of local provision if

projected revenue savings can be demonstrated.

3.4 The expectations of what is required in order for agreement to be reached under the Safety Valve programme include :

- The local authority's plans show the delivery of sustainable high quality provision (i.e. not making cuts that impact negatively on quality).
- Demonstration of a balanced in-year High Needs budget in the coming years.
- Where possible, the local authority can contribute to the writing off of the historic deficit from future High Needs allocations

3.5 Over recent months, the local authority has been working closely with the DfE's SEND and finance advisors in order to develop and refine the DSG management plan that would form the basis of a Safety Valve agreement, should this be approved. The DSG management plan plots the financial impact of no action being taken, then adds actions – or 'mitigations' – to the plan to demonstrate how savings can be achieved to arrive at an in-year balanced budget. It is essential that the mitigations put forward are deliverable, as the local authority will be held to account for achieving the forecast level of savings, with the risk of funding being withheld if this is not the case.

3.6 The DSG settlement for 2023/24 announced in July 2022 allocated an additional £1.865m of High Needs funding to Blackpool. On top of this, the Autumn Statement included additional funding for schools and High Needs, with Blackpool receiving a further High Needs allocation of £1.165m, taking the total increase to 8.9% compared to 2022/23. This additional funding has allowed the local authority to review the mitigations included in the DSG management plan, and remove or reduce those plans which were less certain to result in savings.

3.7 Since the last meeting of Schools Forum in October, the High Needs sub-group has met to consider the DSG management plan, and feedback from colleagues at that meeting has informed the latest version of the plan. The mitigations have now been grouped around four key themes, as set out belows:

1) Reduce the number of pupils in independent special schools through the expansion of local specialist provision

These schools, the vast majority of which are situated outside of Blackpool, provide specialist places for pupils with the most complex needs, and costs are typically much higher than in maintained special schools or special academies. Furthermore, children usually have to spend long periods of time each day being transported to and from school, which can lead to a lack of connection with the local community. The number of pupils in independent special schools, and consequently costs, have reduced in recent years as a result of the opening of Lotus special school, demonstrating the impact of creating local provision.

The proposals planned for this theme include:

- a. Expansion of Highfurlong special school: the expansion, part-funded by Blackpool Council capital funding, will cater for the increased number of pupils already in the school, as well as providing increased capacity for future pupils.
- b. Creation of an Intensive Support Centre at Park Community Academy: this purpose-built facility would provide education for a small number of pupils, whose complex needs currently cannot be met within Blackpool.
- c. Creation of SEND resourced provision at a mainstream secondary school: these types of bases ensure that limited places at Blackpool's special schools are prioritised for pupils with more complex needs, thereby reducing the need for placements in independent special schools.

A bid for capital funding will be made as part of the Safety Valve process for part of the Highfurlong scheme, and for the Intensive Support Centre. Funding has been set aside within the Council's education capital programme for phase one of the Highfurlong scheme, and for the SEND resourced provision.

2) Continue to increase the proportion of pupils with Education Health and Care Plans in mainstream schools

Nationally, around 40% of all children and young people with Education Health and Care Plans are educated in mainstream schools. In Blackpool, rates have been much lower, with only 18.8% in mainstream schools in 2018. Through concerted efforts, this rate increased to 27.6% in January 2022, but further work remains to be done to continue to close the gap on the national position. This will be achieved by a combination of:

- Consistency of advice and guidance
- Realigning roles in Inclusion Team to provide right support at the right time
- Introduction of inclusion initiatives

3) Tighten management of demand and funding for Education Health and Care Plans

Over recent years, Blackpool moved from a position of a relatively low proportion of the school-age population having Education Health and Care Plans, to levels that are in line with statistical neighbours. Processes have now been reviewed, and tighter controls put in place to ensure the appropriate application of criteria for agreeing plans. These changes are happening in parallel with development of the SEND workforce so that consistent practice becomes embedded across the

service. Separately, the criteria for the allocation of some targeted High Needs funding have been tightened up: the previous methodology was allocating funding to over half of mainstream schools, which was deemed to be no longer “exceptional”, and many schools did not expect the funding or understand why it had been allocated.

4) Rationalise Pupil Referral Unit estate and reduce budget in line with lower numbers

Blackpool’s Pupil Referral Unit used to accommodate a high number of pupils, with a large proportion that were single-registered and remaining in the provision until the end of year 11. Tighter control has been exerted by the local authority over admissions over recent years, leading to a significant reduction in pupil numbers, with most of these now dual registered with schools contributing to costs, and reintegrations into mainstream becoming more common.

Given the relatively rapid reduction in pupil numbers at the Pupil Referral Unit, the school’s budget has been protected over the last three years, with a fixed allocation given rather than top-up based on pupil numbers. Now that numbers are more stable, the local authority is working with the school to determine the level of budget required on an ongoing basis. Plans have been drawn up which could rationalise the building estate, as it is currently operating over three distinct sites, which is likely to deliver efficiency savings and operational benefits. Capital funding is required to deliver the scheme, and this will be included in the Safety Valve capital bid.

3.8 The forecast financial impact of each of the savings is set out in the table below. (Please note that these figures are provisional, and are subject to change as the Safety Valve plans are developed and discussed with the DfE.)

Headline mitigations/savings	2022/23	2023/24	2024/25	2025/26	2026/27
1. Reduction of numbers in independent special schools:					
1A Expansion of Highfurlong	0	0	-231,450	-458,916	-493,437
1B Creation of local Intensive Support Centre	0	0	2,712	8,440	-86,933
1C Creation of secondary Resourced Provision	0	48,957	-24,786	-59,565	-112,486
2. Increase percentage of pupils in mainstream:					
2A Advice/guidance/inclusion initiatives	0	-34,434	-100,313	-155,775	-201,605
2B Realign Inclusion Team roles	-164,791	-173,331	-178,770	-184,052	-190,143
3. Tighten management of demand and funding for EHCPs:					
3A Tighten management of demand for EHC plans	0	-147,597	-258,369	-340,125	-463,672
3B Tighten criteria for targeted	-200,000	-200,000	-200,000	-200,000	-200,000

high needs funding					
4. Rationalise PRU estate and reduce PRU budget in line with lower numbers	0	0	0	-200,000	-206,000
Total	-364,791	-506,405	-990,976	-1,589,994	-1,954,275

3.9 Forecasts have been included in the DSG Management Plan showing the estimated income and expenditure. When the savings quantified above are factored in, the forecasts show a potential reduction of the overall DSG deficit from £4.957m in March 2022 to £2.845m by March 2027. As reported previously, given the scale of the deficit and the ongoing pressures on costs, it has been assumed that a 0.5% transfer from Schools Block will continue to be required in future years, although this will be subject to approval by Schools Forum each year. This is therefore shown within the DSG Management Plan for illustration purposes in each year.

3.10 The table at Appendix 6a to this report summarises the financial position from the latest version of the DSG Management Plan. (Please note that these figures are provisional, and are subject to change as the Safety Valve plans are developed and discussed with the DfE.)

3.11 It is hoped that the Safety Valve programme will afford opportunities to accelerate existing plans, particularly around the creation and rationalisation of local provision in order to reduce costs. The “asks” that have been incorporated so far into the plan are set out below, although there will be opportunities to refine and revise this list prior to finalising the proposals:

- Additional capital funding to fully deliver plans for the creation of sufficient local provision, including:
 - £2.243m for phase 2 of planned expansion scheme at Highfurlong school
 - £2.98m for rationalisation of PRU sites from three to one
 - c.£1.75m for creation of local Intensive Support Centre at Park Community Academy (amount currently being reviewed)
- DfE support to agree use of small parcel of land at Aspire Academy to enable access to Highfurlong expanded site
- A contribution to writing off historic DSG deficit.
- The use of High Needs funding of £190k in 2023/24 to prioritise the clearing of the backlog of statutory assessment work. This will enable all plans to be brought up-to-date, or closed where appropriate, leading to more reliable data and improved confidence in commissioning decisions. The costs have been incorporated into the DSG Management Plan, but do not affect the ability to achieve a balanced budget in that year. A disapplication request will accompany the final submission of the DSG Management Plan to the Safety Valve team.

3.12 The process and timescales for the programme are as follows:

- 13th January 2023: submission of initial proposal for review
- 23rd January 2023: submission of Safety Valve capital bid
- 26th January 2023: presentation of initial proposal to DfE Safety Valve team
- 3rd February 2023: submission of final proposal
- March 2023: Safety Valve agreement in place
- April 2023: commencement of quarterly monitoring.

List of acronyms:

DSG – Dedicated Schools Grant

DfE – Department for Education

SEND – Special Educational Needs and Disabilities

PRU – Pupil Referral Unit

SEMH – Social, Emotional and Mental Health

List of Appendices :

Appendix 6a: DSG Management Plan financial summary

Appendix6a - DSGManagementPlanfinancialsummary

	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
	Actual	Forecast	Budget	Budget	Budget	Budget
	£000s	£000s	£000s	£000s	£000s	£000s
Total High Needs expenditure (unmitigated)	27804	30116	32730	34214	36033	37433
High Needs allocation	-25617	-29207	-31974	-32933	-33921	-34939
In-year (surplus)/deficit - High Needs (unmitigated)	2187	909	756	1281	2112	2494
Planned mitigations	0	-365	-506	-991	-1590	-1954
In-year (surplus)/deficit - High Needs (mitigated)	2187	544	250	290	522	540
Transfer from Schools Block	-457	-494	-528	-528	-528	-528
(Surplus)/deficit from other DSG blocks	-2535	-443	-410	-328	-262	-210
In-year (surplus)/deficit - DSG	-805	-393	-688	-566	-268	-197

Cumulative DSG (surplus)/deficit

4957

4564

3876

3310

3043

2845

Report to : **SCHOOLSFORUM**
Relevant Officer : Hilary Wood, Head of School Finance and Funding
Date of Meeting: 17 January 2023

DEDICATED SCHOOLS GRANT BUDGET 20 23/24

1.0 Purpose of the report :

- 1.1 To share with Schools Forum the proposals for the use of Dedicated Schools Grant (DSG) in 2023/24.
- 1.2 Action required – for consultation (local authority decision).

2.0 Recommendation(s):

- 2.1 Schools Forum is asked to comment on the proposed use of DSG in 2023/24.
- 2.2 Schools Forum is asked to support the local authority's request to disapply the Schools and Early Years Finance Regulations in order to utilise £190k of High Needs funding to support statutory assessment work, as set out in paragraph 3.1.

3.0 Background Information

- 3.1 On 16 December 2022, the Department for Education issued the provisional allocations of DSG for 2023/24. Blackpool's allocations are as follows:

	2023/24
	£m
Schools Block	105.597
Central Schools Services Block	1.142
High Needs Block	31.974
Early Years Block	9.258
Total	147.971

- 3.2 In addition to the DSG covered by the table above, the Government also announced an extra £2 billion for schools and High Needs in its autumn budget statement. The allocation for Blackpool mainstream schools has been provisionally set at £3.755m. This additional funding will be allocated directly to schools as a separate Mainstream Schools Additional Grant with effect from April 2023, with school-level funding amounts to be confirmed in spring 2023. The allocations within the Schools Block plus the additional grant represent a 7.4% increase in funding compared to the Schools Block plus Schools Supplementary Grant allocated in 2022/23.

- 3.3 Blackpool will also receive an additional £1.165m of High Needs funding on top of the DSG amount in the table above. Taken together, these allocation represent an 8.9% increase compared to the High Needs block plus supplementary funding in 2022/23.
- 3.4 The Appendix to this report sets out the proposed use of DSG for 2023/24. For the purpose of budget setting, the additional £3.755m that schools will receive directly via the Mainstream Schools Additional Grant has been excluded, but the additional £1.165m of High Needs funding has been included. The proposed budget is in line with the DSG management plan, which is summarised in the separate Safety Valve report to this meeting.
- 3.5 As per the previous report, the Local Authority is proposing to add £295k from the **SchoolsBlock** to the growth fund contingency, and also to make a transfer of 0.5% from the Schools Block to the High Needs Block, which amounts to £528k. The net figure will be allocated to schools via the local school funding formula.
- 3.6 The **CentralSchoolsServicesBlock** has decreased in total by £54k. This is made up of an increase of £48k (7.0%) on the main block funding, and a decrease of £102k (20%) on the historic commitments funding. There is a balance of £37k that requires allocating within this Block, and this will be effected by way of an in-year adjustment once budget estimates have been finalised. As in previous years, the £410k allocation in respect of historic commitments will be used to help offset the cumulative deficit on DSG.
- 3.7 The total **HighNeedsB lock** increase of £2.6m, including additional Autumn Statement monies, will have a significant impact on the ongoing pressures on costs for pupils with additional needs. While the estimated costs of the High Needs budget are not yet fully contained within the annual funding allocation, transfers from other blocks lead to an overall forecast surplus against DSG.
- 3.8 The Department for Education's (DfE) operational guidance for High Needs funding in 2023/24 contains new requirements to pass on certain levels of increases to special schools and pupil referral units. In order that additional funding from 2022/23 and 2023/24 is passed onto these types of school, DfE have set a minimum funding guarantee (MFG) of a 3% increase for per pupil funding in 2023/24 compared to 2021/22. Furthermore, they have determined that local authorities must pass on 3.4% of the additional High Needs funding in 2023/24 compared to per pupil levels of funding in 2022/23 for special schools and academies, and compared to per pupil levels of local authority income in 2021/22 for maintained pupil referral units. This amount is on top of the 3% MFG compared to 2021/22.

- 3.9 Blackpool's special schools received a 3.5% per pupil increase in 2022/23 compared to 2021/22, so the 3% MFG requirement has already been met. For 2023/24, allowance has been made in the budget proposals for a further per pupil increase of 5%, which is in excess of the 3.4% increase required to be passed on to special schools. The precise mechanism for passing on the 3.4% increase will be determined once further guidance is issued by the DfE in early 2023.
- 3.10 For the Pupil Referral Unit, the position is further complicated since fixed budgets, rather than pupil-driven budgets, have been in place for the past three years in order to help manage the school's finances at a time where pupil numbers have dropped significantly. The local authority has been working closely with the school as it draws up a 3-year financial plan that will place it on a sustainable footing with the reduced number of pupils. Assuming commissioned place numbers of 200 in 2021/22, 185 in 2022/23, and 175 in 2023/24, the proposed budget for 2023/24 meets the requirements of both the 3% MFG and the 3.4% passing on of additional High Needs funding. Again, the precise mechanism for passing on the 3.4% increase will be determined once further guidance is issued by the DfE in early 2023.
- 3.11 No such requirements are contained within DfE guidance relating to Resourced Provision. However, as part of the ongoing review of these provisions, the funding model has been updated, taking into account the findings of the review as well as latest cost information. This has resulted in an increase of 4.9% for a class of 8, and an increase of 5.63% for a class of 12.
- 3.12 Costs of £190k have been included in the High Needs budget proposals for 2023/24 to prioritise the clearing of the backlog of statutory assessment work. This will enable all plans to be brought up-to-date, or closed where appropriate, leading to more reliable data and improved confidence in commissioning decisions. The costs do not affect the ability to deliver a surplus in the year. A request to disapply the Schools and Early Years Finance Regulations must be submitted with the Safety Valve proposals in order for this use of DSG to be permitted, and the support of Schools Forum is therefore requested.
- 3.13 It is proposed that the **EarlyYearsBlock** funding is fully allocated to Early Years provision and services. In 2023/24, the hourly funding rate for 3 and 4 year olds will increase by 31p to £4.98 (6.6%), however 8p of this relates to the rolling into the grant of funding for the former Teachers' Pay Grant and Teachers' Pensions Exceptional Circumstances Grant, meaning that the like-for-like increase is 23p (4.9%). The rate for 2 year olds will increase by 6p to £5.63 (1.1%); the recent consultation on reforms to the funding formulae for Early Years has resulted in more of the funding for 2-year olds being driven through the Area Cost Adjustment, leaving Blackpool being protected with a minimum floor increase. Early Years Pupil Premium is set to increase by £18k to £118k (17.8%), and the Disability Access Fund will increase by £5k to £75k (7%). The number of 3 and 4 year olds accessing the free

entitlement has remained relatively static, with the number of 2 year olds increasing by 10.6%, partially reversing the reduction from the previous year.

- 3.14 The Early Years Provider Strategy Group will meet in the New Year to consider proposed funding rates for Blackpool providers, and the level required for the Early Years Inclusion Fund, as well as the methodology for distributing the former teachers' pay and pension grants.
- 3.15 Taking into account the information above, it is currently estimated that the in-year surplus on DSG could amount to £688k, which would reduce the forecast cumulative deficit at 31st March 2024 to £3.876 million.

List of acronyms:

DSG – Dedicated Schools Grant
DfE – Department for Education
MFG – Minimum Funding Guarantee

List of Appendices:

Appendix 7a – Draft DSG Budget 2023/24

	2023/24	2022/23	Movement	%Change	Notes
	Total	Total			
SchoolsBlock					
Local Schools Budget	104,773,917	98,178,624	6,595,293	6.7%	After 0.5% transfer to HN
- Union Duties (de-delegated)		18,837	(18,837)	-100.0%	Subject to Schools Forum decision
- Free School Meals Eligibility Checks (de-delegated)		19,025	(19,025)	-100.0%	Subject to Schools Forum decision
- School Improvement (de-delegated)		25,026	(25,026)	-	Subject to Schools Forum decision
- Education Functions (retained)		165,676	(165,676)	-100.0%	Subject to Schools Forum decision
Business Rates reserve		6,486	(6,486)		
Transfer to growth contingency	294,687		294,687		
	105,068,604	98,413,674	6,654,930	6.8%	
CentralSchoolsServicesBlock					
Servicing of Schools Forum	18,113	18,113	-	0.0%	
Licences & Subscriptions	104,433	93,018	11,415	12.3%	Actual figures provided by DfE
School Admissions	168,407	168,407	-	0.0%	
Former ESG retained duties					
- Education Welfare	234,928	234,928	-	0.0%	
- Asset Management	68,341	68,341	-	0.0%	
- Statutory / Regulatory duties	101,318	101,318	-	0.0%	
Other	36,696		36,696		To be re-allocated within block
	732,235	684,124	48,111	7.0%	
HighNeedsBlock					
SpecialSchools					
Place Funding	6,054,167	5,894,333	159,834	2.7%	
Top-up Funding	5,242,040	4,529,118	712,922	15.7%	
TotalSpecialSchools	11,296,207	10,423,451	872,756	8.4%	
ResourceProvision					
Place Funding	454,000	518,667	(64,667)	-12.5%	
Top-up Funding	873,043	530,183	342,860	64.7%	
TotalResourceProvision	1,327,043	1,048,850	278,193	26.5%	
AlternativeProvision					
Place Funding	1,750,000	1,850,000	(100,000)	-5.4%	
Top-up Funding	1,520,054	1,251,650	268,404	21.4%	
Other AP Provision	300,000	100,000	200,000	200.0%	
TotalAlternativeProvision	3,570,054	3,201,650	368,404	11.5%	
MainstreamSchools					
Top-up Funding	2,948,802	2,479,470	469,332	18.9%	
Exceptional Circumstances Funding	158,000	165,000	(7,000)	-4.2%	
Totaltop-upforMainstreamSchools	3,106,802	2,644,470	462,332	17.5%	
Post-16 Education	3,299,446	2,859,831	439,615	15.4%	
Out of Borough	5,673,224	4,761,788	911,436	19.1%	
Specialist Advisory and Referral Service (SARS)	1,549,669	1,531,339	18,330	1.2%	
Access and Inclusion	1,629,424	1,414,108	215,316	15.2%	
Other High Needs Central Services (Management, Central Support Costs, Admin Support, Pension Top-slice)	771,865	771,865	-	0.0%	
	32,223,734	28,657,352	3,566,382	12.4%	
EarlyYearsBlock					
2 Year Old Grants	1,733,139	1,499,590	233,549	15.6%	
3 & 4 Year Old Grants	7,332,899	6,578,405	754,494	11.5%	
Early Years Pupil Premium	117,916	100,083	17,833	17.8%	
Disability Access Fund	74,520	69,600	4,920	7.1%	
Early Years Inclusion Fund		60,000	(60,000)	-100.0%	To be re-allocated from grants
Other Early Years Central Services (Management, Central Support Costs, Training, Admin Support, Pension Top-slice)	-	341,000	(341,000)	-100.0%	To be re-allocated from grants
	9,258,474	8,648,678	609,796	7.1%	
Total	147,283,047	136,403,828	10,879,219	8.0%	
DSG	(147,970,724)	(137,870,110)	(10,100,614)	7.3%	
ESFAspecialfreeschoolfunding		(49,333)	49,333		
Transferfromgrowthcontingency		(89,767)	89,767		
DedicatedSchoolsGrantAllocations	(147,970,724)	(138,009,210)	(9,961,514)		
Deficit/ (Surplus)	(687,677)	(1,605,382)	917,705		

	SchoolsBlock	Central Schools ServicesBlock	HighNeeds Block	EarlyYears Block	Total
Original DSG Allocations 2022/23	105,596,587	1,141,835	31,973,828	9,258,474	147,970,724
Additional allocation - Spending Review 2021	-	-	-	-	-
Proposed transfers between blocks	(527,983)	-	527,983	-	-
	105,068,604	1,141,835	32,501,811	9,258,474	147,970,724
Estimated spend as above	105,068,604	732,235	32,501,811	9,258,474	147,283,047
Reduction/(addition) to cumulative DSG deficit	-	409,600	278,077	-	687,677

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Report to : **SCHOOLSFORUM**

Relevant Officer : Hilary Wood, Head of School Finance and Funding

Date of Meeting: 17 January 2023

SCHOOLS FUNDING FORMULA 2023/24 PROPOSALS

1.0 Purpose of the report :

1.1 To consider the local authority's proposal for the schools funding formula for 2023/24.

1.2 To note the estimated allocations of the Mainstream Schools Additional Grant 2023/24.

1.3 Action required – for consultation (local authority decision); voting restricted to school and Early Years representatives.

2.0 Recommendation(s):

2.1 Schools Forum is asked to agree to the local authority's proposal for the allocation of school funding in 2023/24.

2.2 Schools Forum is asked to note the estimated allocations of the Mainstream Schools Additional Grant 2023/24.

3.0 Background Information

3.1 At its meeting of 11 October 2022, Schools Forum agreed to the following principles for the 2023/24 schools funding formula:

- Continue to apply the National Funding Formula (NFF) unit values;
- Set a minimum funding guarantee of 0.5% per pupil funding;
- Transfer 0.5% from the Schools Block to the High Needs Block by way of a reduction to the Basic Entitlement;
- Transfer any surplus from the growth funding allocation into the growth funding contingency.

3.2 The Minimum Per Pupil Funding levels, which are mandatory in local funding formulae, have increased to £4,405 for primary schools, and £5,715 for secondary schools.

- 3.3 On 16 December 2022, the Department for Education (DfE) announced allocations of Dedicated Schools Grant (DSG) for 2023/24. Based on a Pupil Unit of Funding of £4,981 and a Secondary Unit of Funding of £6,809, together with pupil numbers taken from the October 2022 school census, Blackpool's Schools Block of funding is £105.597 million, which includes growth funding of £670k. However, changes in the relative additional needs of pupils between the October 2021 and October 2022 censuses place a pressure of £227k on the allocated funding once the NFF factors are applied in Blackpool's formula.
- 3.4 The growth funding of £670k compares to £674k in 2022/23. It is a formulaic allocation based on changes in pupil numbers across all schools in the town, and is used to fund the pupils in new and/or growing schools who would otherwise not attract allocations through the lagged funding system. Currently in Blackpool, the only new and growing school is Armfield Academy. The 2022 intake at Armfield Academy saw the secondary phase filled up, with only two further years of new year groups to follow in the primary phase. This means that the requirement for growth funding for Armfield Academy in 2023/24 and 2024/25 is significantly lower than in previous years.
- 3.5 The requirement to fund the estimated new primary pupils in Armfield Academy from September 2023 to March 2024 is £149k, leaving a surplus of £521k compared to the available growth funding. Once the pressure of applying the NFF in the local formula is taken into account, there remains a balance of £295k available to transfer to the growth contingency for future years.
- 3.6 Schools Forum agreed at its October 2022 meeting to make a 0.5% transfer from the Schools Block to the High Needs Block, and to do this by way of a reduction to the Basic Entitlement factor values. 0.5% of the Schools Block equates to £528k, and the effect on the Basic Entitlement values is shown in the table below:

Description	Amount Per Pupil National Formula Values	Amount Per Pupil Local Formula Values	Difference Per Pupil	% Change
Primary (Years R-6)	£3,394	£3,365.79	£28.21	0.83%
Key Stage 3 (Years 7-9)	£4,785	£4,745.23	£39.87	0.83%
Key Stage 4 (Years 10-11)	£5,393	£5,348.18	£44.82	0.83%

- 3.7 The proforma showing full details of Blackpool's proposed formula is contained in Appendix 8a to this report.

3.8 **Mainstream Schools Additional Grant 2023/24**

The autumn statement confirmed £2 billion funding for schools and High Needs for the 2023/24 financial year, above the previous settlement for that year. Mainstream schools will be allocated £1.6 billion of this additional funding, to provide support for inflationary pressures, with the remainder increasing allocations for High Needs.

3.9 The funding will be allocated through the Mainstream Schools Additional Grant from April 2023, before being incorporated into the schools National Funding Formula in 2024/25. The grant will continue for the period April to August 2024 for academies.

3.10 The allocations will be based on the following methodology:

- Basic per-pupil rate of £119 for primary pupils
- Basic per-pupil rate of £168 for key stage 3 pupils
- Basic per-pupil rate of £190 for key stage 4 pupils
- Lump sum of £4,510
- FSM6 per-pupil rate of £104 per eligible primary pupil
- FSM6 per-pupil rate of £152 per eligible secondary pupil

3.11 Final allocations will be confirmed and paid in spring 2023. Given that the October 2022 pupil data is now available, an estimate of the allocation for mainstream schools can be found at Appendix 8b, totalling c.£3.76 million.

List of acronyms:

DfE	Department for Education
DSG	Dedicated Schools Grant
NFF	National Funding Formula

List of Appendices:

Appendix 8a – Blackpool Schools Funding Formula Proforma 2023/24

Appendix 8b – Mainstream Schools Additional Grant 2023/24 – estimate

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Local Authority Funding Reform Formula									
LA Name:		Blackpool							
LA Number:		R02							
Primary (KS only) minimum per pupil funding level		Secondary (KS only) minimum per pupil funding level		Secondary (KS only) minimum per pupil funding level		Secondary minimum per pupil funding level		Disaggregation number where alternative MPF values are used	
£4,405.00		£5,503.00		£6,033.00		£5,715.00			
Pupil/Factor									
Reception/pupfl		No		Pupfl/units		0.00			
Description		Amount per pupil		Pupfl/units		SubTotal		Total	
1) Basic Entitlement Age Weighted Pupil Unit (AWPU)									
Primary (Years 1-6)		£3,365.79		11,891.00		£39,349,480		37.63%	
Key Stage 3 (Years 7-9)		£4,745.23		4,133.00		£19,612,043		18.75%	
Key Stage 4 (Years 10-11)		£5,348.18		2,632.00		£14,076,407		13.46%	
Description		Primary amount per pupil		Secondary amount per pupil		Eligible proportion of primary NOR		Eligible proportion of secondary NOR	
2) Deprivation									
FSM		£480.00		£480.00		4,627.48		3,019.00	
FSM6		£705.00		£1,030.00		4,745.40		3,324.00	
DfES Band F		£230.00		£335.00		1,273.89		681.06	
DfES Band E		£280.00		£445.00		1,369.97		814.27	
DfES Band D		£440.00		£620.00		396.14		257.06	
DfES Band C		£480.00		£680.00		1,004.06		601.17	
DfES Band B		£510.00		£730.00		1,340.85		863.26	
DfES Band A		£670.00		£930.00		2,729.26		1,798.92	
SubTotal									
Total								£17,763,516	
Proportion of total (pre-MFG funding)								16.96%	
Primary Notional SEN (%)								10.00%	
Secondary Notional SEN (%)								10.00%	
3) English as an Additional Language (EAL)									
EAL 3 Primary		£580.00		£71.80				£389,641	
EAL 3 Secondary		£1,565.00		£166.40				£166,834	
Total								£766,770	
Proportion of total (pre-MFG funding)								0.53%	
Primary Notional SEN (%)								0.00%	
Secondary Notional SEN (%)								0.00%	
4) Mobility									
Pupfl starting school outside of normal entry dates		£945.00		£1,360.00		163.12		43.49	
Total								£212,295	
Proportion of total (pre-MFG funding)								0.20%	
Primary Notional SEN (%)								0.00%	
Secondary Notional SEN (%)								0.00%	
5) Low prior attainment									
Primary low prior attainment		£1,155.00		£1,750.00		32.32%		3,778.73	
Secondary low prior attainment (year 7)		54.47%		25.25%					
Secondary low prior attainment (year 8)		64.53%		22.31%					
Secondary low prior attainment (year 9)		64.53%		22.30%		1,574.46		£2,755,299	
Secondary low prior attainment (year 10)		64.53%		22.26%					
Secondary low prior attainment (year 11)		63.59%		24.28%					
Total								£7,119,733	
Proportion of total (pre-MFG funding)								6.81%	
Primary Notional SEN (%)								75.00%	
Secondary Notional SEN (%)								75.00%	
Other Factors									
Factor		Lump Sum per Primary School (£)		Lump Sum per Secondary School (£)		Lump Sum per Middle School (£)		Lump Sum per All-through School (£)	
7) Lump Sum		£138,000.00		£128,000.00					
8) Sparsity factor		£1.00		£1.00					
Total (£)								£4,992,000	
Proportion of total (pre-MFG funding)								4.77%	
Notional SEN (%)								0.00%	
Rows 4 to 8 are populated with the NFF methodology, please leave this as is if you wish to follow the NFF. As per the Operational Guidance, the distance thresholds can be increased or the year group size thresholds decreased and the distance threshold taper is optional. An alternative method of allocation to the NFF's average year group size taper can be chosen: the continuous taper (Tapered) or fixed sum (Fixed). Examples of each are provided in the Operational Guidance.									
9) Distance threshold (miles)		Primary pupil number average year group threshold		Secondary pupil number average year group threshold		Middle school pupil number average year group threshold		All-through pupil number average year group threshold	
Primary distance threshold (miles)		2.00		21.40		Apply primary distance taper		Yes	
Secondary distance threshold (miles)		3.00		120.00		Apply secondary distance taper		Yes	
Middle school distance threshold (miles)		2.00		69.20		Apply middle school distance taper		Yes	
All-through school distance threshold (miles)		2.00		62.50		Apply all through distance taper		Yes	
10) Fringe Payments								£0	
11) Split Sites								£0	
12) Rates								£647,303	
13) PFI Funding								£0	
14) Exceptional circumstances (can only be used with prior agreement of ESFA)								£0	
Circumstance								Total (£)	
Additional lump sum for schools amalgamated during FY22-23								£0	
Additional sparsity lump sum for small schools								£0	
Exceptional Circumstance 3								£0	
Exceptional Circumstance 4								£0	
Exceptional Circumstance 5								£0	
Exceptional Circumstance 6								£0	
Exceptional Circumstance 7								£0	
Total Funding for Schools Block Formula (excluding MFG funding level and MFG funding total)								£104,320,252	
Proportion of total (pre-MFG funding)								99.73%	
15) Additional funding to meet minimum per pupil funding level								£259,209	
Proportion of total (pre-MFG funding)								0.25%	
Total Funding for Schools Block Formula (including MFG funding total)								£104,579,461	
Proportion of total (pre-MFG funding)								100.00%	
16) Minimum Funding Guarantee				0.50%				£194,462	
Where a value less than 0% or greater than 0.5% has been entered please provide the disaggregation reference number authorising the value									
Apply capping and scaling factors? (basis may be capped above a specific cutting and/or scaled)								No	
Capping Factor (%)				Scaling Factor (%)					
Total deduction of capping and scaling factors are applied								£0	
MFG Net Total Funding (MFG + deduction from capping and scaling)								£194,462	
Proportion of total (pre-MFG funding)								0.19%	
Total Funding for Schools Block Formula								£104,773,913	
Proportion of total (pre-MFG funding)								£10,040,686	
17) High needs threshold (only fill in if, exceptionally, a high needs threshold different from £6,000 has been approved)								£0.00	
Additional funding from the high needs budget								£0.00	
Growth fund (if applicable)								£294,687.00	
Falling rolls fund (if applicable)								£0.00	
18) Other Adjustment to 22-23 Budget Shares								£0	
Total Funding for Schools Block Formula (including growth and falling rolls funding)								£105,068,600	
19) Net Total Funding from Basic Entitlement								£5,947	
20) Pupil/Factor Funding								94.86%	
Primary/Secondary Ratio								1: 1.37	
21-24 NFF NDR allocation								£640,172	
Total Funding for Schools Block Formula (including growth and falling rolls funding after deductions) 21-24 NFF NDR Allocation								£104,428,428	

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MainstreamSchoolsAdditionalGrant2023/24
Estimateofallocations

	NOR Primary	£per pupil	NOR KS3	£per pupil	NOR KS4	£per pupil	FSM6 Primary	£per pupil	FSM6 Secondary	£per pupil	Lumpsum perschool	Estimated allocation
Layton Primary School	617	119	0	168	0	190	277	104	0	152	4510	106741
Kincraig Primary School	174	119	0	168	0	190	85	104	0	152	4510	34056
Boundary Primary School	368	119	0	168	0	190	244	104	0	152	4510	73678
Bispham Endowed Church of England Primary School	333	119	0	168	0	190	120	104	0	152	4510	56617
Blackpool St Nicholas CofE Primary School	412	119	0	168	0	190	63	104	0	152	4510	60090
Blackpool St John's Church of England Primary School	206	119	0	168	0	190	104	104	0	152	4510	39840
Our Lady of the Assumption Catholic Primary School	204	119	0	168	0	190	22	104	0	152	4510	31074
St John Vianney's Catholic Primary School	418	119	0	168	0	190	93	104	0	152	4510	63924
Holy Family Catholic Primary School	207	119	0	168	0	190	41	104	0	152	4510	33407
St Bernadette's Catholic Primary School	206	119	0	168	0	190	35	104	0	152	4510	32664
Moor Park Primary School	370	119	0	168	0	190	128	104	0	152	4510	61852
Stanley Primary School	563	119	0	168	0	190	167	104	0	152	4510	88875
Revoe Learning Academy	399	119	0	168	0	190	232	104	0	152	4510	76119
St Cuthbert's Catholic Academy	188	119	0	168	0	190	86	104	0	152	4510	35826
Marton Primary Academy and Nursery	278	119	0	168	0	190	139	104	0	152	4510	52048
Blackpool Gateway Academy	327	119	0	168	0	190	248	104	0	152	4510	69215
Roseacre Primary Academy	564	119	0	168	0	190	213	104	0	152	4510	93778
Westminster Primary Academy	408	119	0	168	0	190	307	104	0	152	4510	84990
Hawes Side Academy	531	119	0	168	0	190	195	104	0	152	4510	87979
Norbreck Primary Academy	598	119	0	168	0	190	128	104	0	152	4510	88984
Anchorsholme Primary Academy	615	119	0	168	0	190	106	104	0	152	4510	88719
Thames Primary Academy	372	119	0	168	0	190	213	104	0	152	4510	70930
Waterloo Primary Academy	547	119	0	168	0	190	305	104	0	152	4510	101323
Westcliff Primary Academy	206	119	0	168	0	190	40	104	0	152	4510	33184
Mereside Primary Academy	265	119	0	168	0	190	176	104	0	152	4510	54349
Baines' Endowed Church of England Primary Academy	461	119	0	168	0	190	172	104	0	152	4510	77257
St Kentigern's Catholic Primary School	209	119	0	168	0	190	49	104	0	152	4510	34477
Christ The King Catholic Academy	210	119	0	168	0	190	87	104	0	152	4510	38548
St Teresa's Catholic Primary School	203	119	0	168	0	190	47	104	0	152	4510	33555
Devonshire Primary Academy	415	119	0	168	0	190	272	104	0	152	4510	82183
Langdale Free School	94	119	0	168	0	190	27	104	0	152	4510	18504
South Shore Academy	0	119	464	168	308	190	0	104	514	152	4510	219110
Blackpool Aspire Academy	0	119	504	168	346	190	0	104	565	152	4510	240802
Highfield Leadership Academy	0	119	364	168	185	190	0	104	333	152	4510	151428
Montgomery Academy	0	119	710	168	450	190	0	104	448	152	4510	277386
St George's School A Church of England Academy	0	119	614	168	394	190	0	104	384	152	4510	240890
St Mary's Catholic Academy	0	119	644	168	408	190	0	104	372	152	4510	246766
Unity Academy Blackpool	389	119	361	168	230	190	233	104	386	152	4510	238053
Armfield Academy	299	119	472	168	311	190	91.6	104	322	152	4510	236947

3756168

DfE provisional allocation
Dfference

3755066

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Report to: **SCHOOLS FORUM**
Relevant Officer: Hilary Wood, Head of School Finance and Funding
Date of Meeting: 17 January 2023

DE-DELEGATION OF SERVICES AND RETENTION OF FUNDING FOR EDUCATION FUNCTIONS 2023/24

1.0 Purpose of the report:

1.1 Approval is sought for the de-delegation of services and the retention of funding for Education Functions.

1.2 Action required - for approval (Schools Forum decision by relevant members, as set out in paragraphs 2.1 to 2.4 below).

2.0 Recommendation(s):

2.1 The local authority recommends that de-delegation is approved by maintained primary school representatives for 2023/24 in respect of Free School Meal (FSM) Eligibility Checks.

2.2 The local authority recommends that de-delegation is approved by maintained primary school representatives for 2023/24 in respect of Union Duties.

2.3 The local authority recommends that de-delegation is approved by maintained primary school representatives for 2023/24 in respect of School Improvement.

2.4 Maintained school representatives, including primary, special and pupil referral unit members, are asked to approve an amount to be retained from school budgets in respect of education functions, previously funded by the Education Services Grant.

3.0 Background Information

3.1 De-delegation of Services

The Schools Finance Regulations that came into effect in April 2013 require the delegation to schools of the entirety of the Schools Block funding, subject to certain prescribed exceptions.

3.2 Maintained, mainstream schools may choose, by vote at Schools Forum, to de-delegate some of these prescribed elements of funding to be managed centrally by the local authority on their behalf. Delegation means the allocation of funding to schools through the local schools funding formula. De-delegation means the retention by the local authority of funding that would otherwise be delegated to schools.

- 3.3 Decisions are to be made by primary and secondary phases separately, and voting is restricted to school members representing those phases. De-delegation does not apply to academies, which could instead choose to buy into local authority services. It also does not apply to special schools or Pupil Referral Units, as they no longer receive delegated budgets in the same way that mainstream schools do, but they will be able to access any collective arrangements using their funding.
- 3.4 The difference between de-delegation and buy back is that, with de-delegation, all maintained schools in that phase will not receive an element of funding in their delegated budgets, and the local authority will hold the de-delegated budgets centrally and provide services on behalf of all schools. If de-delegation is not voted for, all schools will receive the full amount of funding, and may choose, on a school-by-school basis, how to fund those responsibilities. As with any item of expenditure, should Schools Forum not vote for de-delegation, groups of schools could still choose to combine their resources in order to achieve best value, including buying services back from the local authority where available.
- 3.5 Maintained schools are asked to vote to de-delegate the following services in 2023/24:
- a) Free School Meal eligibility checks
 - b) Union duties
 - c) School improvement

3.6 **Free School Meal eligibility checks**

This service is carried out by the Council's Benefits Team, who access DWP and Council benefits information in order to determine eligibility for free school meals. Eligibility is reviewed on a weekly basis and communicated to schools. The full FSM eligibility checking service specification includes:

- Establishing entitlement to FSM for each pupil via Housing Benefit and Council Tax Reduction Scheme claims for parents/guardians;
- Processing of Free School Meal applications for parents who are not entitled to Housing Benefit and Council Tax Reduction, including those in receipt of Universal Credit, by completion of the Free School Meal application form;
- Processing of claims relating to FSM entitlement, including collection and verification of evidence when required, notification of entitlement to parent/guardian/school, and maintenance of records, within 10 working days of receipt of all information;
- Provision of a comprehensive enquiry and resolution service for the school and parents or guardians, to be resolved within five working days;
- Maximisation of income available to parents by awarding Free School Meals in all appropriate cases;
- Production and issue of standard weekly reports to the school;
- Notification to parent/guardian when entitlement ceases due to a change of circumstances, within 10 working days of receipt of all information;
- Processing changes of address/school;

- Provide information as required to assist the school in their reconciliation of data and quarterly census returns;
- Provision of guidance to the school as and when required;
- Secure storage of data to comply with the General Data Protection Regulations (GDPR).

3.7 Schools are not permitted to access the benefits information directly from the relevant agencies, and therefore a school-based solution would necessitate the regular provision by parents of benefits entitlement, significant administrative resource for schools, as well as the development of technical expertise. For this reason, the local authority would strongly advise the continued de-delegation of funding for this purpose.

3.8 In order to fund the current level of service as described in paragraph 3.6, the de-delegation amount per Free School Meal pupil will be set at £13.90 in 2023/24, compared to £13.23 in 2022/23. The increase equates to 5% in recognition of cost inflation.

3.9 **Vote**

Do maintained mainstream primary school members agree to the continued de-delegation of funding for free school meal eligibility checks at the rate of £13.90 per free school meal pupil?

3.10 **Union duties**

Historically, this budget has been held centrally in order to fund the facilities time of the teaching unions. Agreement is reached between unions through the Professional Teaching Association and Unison regarding the number of days that each union can claim from the central pot.

3.11 In October 2020 it was agreed at Schools Forum that Unison will now be included within the collective funding arrangements. This means that members of both teaching and non-teaching unions can be supported by local representatives during the school day. At the same time, Schools Forum agreed to a five-year plan for the use of accumulated reserves, which set out the per pupil rate payable by schools, as well as the day rate for union cover. In 2022/23, Schools Forum members requested that the per pupil rate was not increased in line with the agreed five-year plan, due to the level of reserves held, and the rate was consequently held at £4.20 per pupil.

3.12 The five-year plan has now been reviewed, and can be seen at Appendix 9a to this report. It is proposed that the de-delegation amount for 2023/24 is increased by 30p per pupil to £4.50, a 7.1% increase over two years since 2021/22. At this level, it is estimated that the reserves in 2023/24 would reduce by £15k to £7k, before being fully utilised in the following year. Based on current levels of buy in, it would be necessary to reduce the number of facilities time days claimed by the unions from September 2024, or increase the per pupil rate from the planned £5, and this will be kept under review.

3.13 **Vote** – do maintained mainstream primary school members agree to the continued de-delegation of funding for union duties at the rate of £4.50 per pupil?

3.14 **School improvement**

In October 2021, the Department for Education (DfE) launched a consultation: *Reforming how local authorities' school improvement functions are funded*. As a result of the consultation, the DfE reduced the LA School Improvement Monitoring and Brokering Grant by half in 2022/23, with plans to remove it completely from April 2023. Given the small number of local authority schools, Blackpool historically received the minimum grant level of £50k each year.

3.15 The grant has been provided to local authorities since 2017 to enable them to fulfil their core school improvement responsibilities in respect of maintained schools. These core functions are set out in Part 4 of the Education and Inspections Act 2006 and in the Schools Causing Concern guidance, which provide the powers for local authorities to warn and intervene in schools causing concern, through issuing warning notices setting out actions governing bodies are to take, establishing interim executive boards, or suspending the right to delegated budgets.

3.16 The funding available to local authorities to meet their statutory duties needs to be replaced by de-delegation of funding from maintained schools, or by setting up a traded service. If maintained schools do not support de-delegation at Schools Forum, the local authority would have the option to seek Secretary of State approval to deduct the funding from schools.

3.17 The rationale for the DfE's proposal to remove the grant lies in their belief that local authorities use the grant predominantly on early challenge and support in cases of potential underperformance, rather than for formal intervention powers. The DfE therefore proposed that funding for these activities is replaced by de-delegation from maintained school budgets or buy-back from a traded service, arguing that academies in trusts have their funding reduced in respect of school improvement through the MAT top-slice, and stand-alone academies have to pay for it from their school budgets.

3.18 Blackpool's grant reduced to £25k in 2022/23 and will be removed completely from 2023/24. Maintained schools agreed to de-delegate funding in 2022/23 to cover the reduction in grant, and a vote on de-delegation is now required to account for the removal of the full grant in 2023/24. It is proposed that the per pupil amount is doubled from the 2022/23 rate of £5.58, and 5% added for cost inflation, taking the per pupil amount for 2023/24 to £11.72.

3.19 **Vote**

Do maintained mainstream primary school members agree to the de-delegation of funding for school improvement services at the rate of £11.72 per pupil?

3.20 **Education Functions**

In the 2015 Spending Review, the Government announced that it would be cutting £600m from the Education Services Grant (ESG), a funding stream paid to local authorities outside of the local government finance settlement in respect of certain education functions.

3.21 There were two elements of ESG – the retained grant, and the general grant. Retained ESG was only paid to local authorities, and funded the responsibilities they hold for all pupils in the area, regardless of whether they are educated in maintained or academy schools. The general element of ESG was paid to local authorities in respect of the pupils in maintained schools. It was also paid separately to each academy in respect of the pupils in their own school.

3.22 In November 2016, details were released of how the £600m of savings would be realised. The retained element of ESG was transferred into Dedicated Schools Grant from April 2017, and has formed part of the Central Schools Services Block since April 2018. The general element of the grant ended in September 2017 for both local authorities and academies.

3.23 Despite the removal of the general element of the grant, the local authority remains responsible for providing the functions that were covered by it on behalf of its maintained schools. Financial regulations allow for funding to be retained from the budgets of maintained schools in order to cover the costs.

3.24 In previous years, Schools Forum agreed to allow the local authority to retain funding from maintained school budgets in order to cover specific support that is provided to maintained schools (but not to academies) at no cost. The education functions covered by the retention in respect of Blackpool's maintained schools include:

- Budgeting, accounting and finance functions, e.g. production of statement of accounts, year-end audit, VAT advice, treasury management
- Production of and monitoring of compliance with the Scheme for Financing Schools
- Internal audit compliance visits
- Administration of local government and teachers' pension schemes
- Provision of information to or at the request of the Crown
- Functions under the Equality Act 2010
- Asset management, including condition surveys to ensure assets are in suitable state of repair
- Monitoring of National Curriculum assessments

3.25 The 2023/24 amount has been calculated at £38.79 per pupil, which equates to a 5% increase on the 2022/23 amount of £36.94, in recognition of cost inflation.

3.26 **Vote**

Do maintained school members, including primary, special and pupil referral unit members, agree to the amount of £36.94 per pupil being retained from school budgets for the purpose of funding education functions?

List of appendices:

Appendix 9 (a) – Five-year plan for Union Facilities Time

List of acronyms:

FSM – Free School Meals

DWP – Department for Work and Pensions

GDPR – General Data Protection Regulations

DfE – Department for Education

LA – Local Authority

MAT – Multi-Academy Trust

ESG – Education Services Grant

VAT – Value Added Tax

Appendix 9a – Five-year plan for Union Facilities Time

	<u>2020/21</u>	<u>2021/22</u>	<u>2022/23</u>	<u>2023/24</u>	<u>2024/25</u>	<u>2025/26</u>	<u>2026/27</u>
Cost Per Pupil	£4.00	£4.20	£4.20	£4.50	£4.75	£5.00	£5.00
Daily claim rate - PTA	£180.00	£200.00	£200.00	£200.00	£200.00	£200.00	£200.00
Daily claim rate - Unison	£150.00	£150.00	£150.00	£150.00	£150.00	£150.00	£150.00
Teacher Unions 9.5 days p.w. - reduce to 9 days from Sep 24	£64,980.00	£72,200.00	£76,000.00	£76,000.00	£73,783.33	£72,200.00	£72,200.00
Unison 1 day p.w. from Sep 22; 2 days p.w. from Sep 23; 1.5 days p.w. from Sep 24		£11,400.00	£11,400.00	£11,400.00	£9,737.50	£8,550.00	£8,550.00
Total costs per allocated days	£64,980.00	£83,600.00	£87,400.00	£87,400.00	£83,520.83	£80,750.00	£80,750.00
Income from Academies (based on current levels of sign-up for Facilities Time)	£47,701.32	£50,086.39	£52,065.74	£51,266.25	£54,439.88	£57,369.38	£58,590.00
Income from Maintained (based on current levels of de-delegation)	£0.00	£19,847.80	£19,556.95	£20,953.88	£22,117.98	£23,282.08	£23,282.08
Total Income based on current sign up	£47,701.32	£69,934.19	£71,622.69	£72,220.13	£76,557.85	£80,651.46	£81,872.08
Planned surplus/(deficit)	-£17,278.68	-£13,665.81	-£15,777.31	-£15,179.88	-£6,962.98	-£98.54	£1,122.08
Actual variance	£28,587.18	-£7,964.52					
Reserves brought forward	£48,273.77	£59,582.27	£37,951.94	£22,174.63	£6,994.76	£31.78	-£66.76
Reserves carried forward	£59,582.27	£37,951.94	£22,174.63	£6,994.76	£31.78	-£66.76	£1,055.32

