



THE LONDON BOROUGH
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DATE: 23 November 2023

To: Members of the
SCHOOLS' FORUM

- | | |
|---------------------------------|--|
| David Dilling (Chairman) | Primary Academy Governor (Charles Darwin Academy Trust) |
| Andrew Ferguson (Vice-Chairman) | Non-School Representative (Church of England)(Aquinas Trust) |
| Tracey Davis | Non-Schools Representative(14-19 Partnership)(Bromley Academy Trust) |
| Patrick Foley | Primary Maintained Head Teacher (Southborough Primary School) |
| Chris Hollands | Primary Academy Head Teacher (Aquinas Trust) |
| Neil Miller | PRU Head Teacher/Governor Academy (Bromley Trust Academy) |
| Andrew Rees | Secondary Maintained School Head Teacher (St Olaves Grammar School) |
| Brid Stenson | Non-School Representative (Early Years) |
| Ian Travis | Special Head Teacher/Governor Academy (Glebe School) |
| Steve Whittle | Secondary Academy Head Teacher (Impact Multi Academy Trust) |
| David Wilcox | Secondary Academy Governor (Darrick Wood School) |
| 1 x vacancy | Secondary Academy Head Teacher |
| 1 x vacancy | Non-School Representative (Catholic Church) |
| 1 x vacancy | Primary Academy Head Teacher |
| 1 x vacancy | Primary Academy Governor |
| 1 x vacancy | Secondary Academy Governor |
| 1 x vacancy | Special Head/Governor Maintained |
| 1 x vacancy | Primary Academy Governor |

A virtual meeting of the Schools' Forum will be held via MS Teams on **THURSDAY 30 NOVEMBER 2023 AT 4.30 PM** *

If you wish to view this meeting, please contact the Clerk to the Schools' Forum who will provide you with a link to the virtual meeting.

*** PLEASE NOTE STARTING TIME***

TASNIM SHAWKAT
Director of Corporate Services & Governance

A G E N D A

- 1 APOLOGIES FOR ABSENCE**
- 2 MINUTES OF THE MEETING HELD ON 14TH SEPTEMBER 2023** (Pages 3 - 6)
- 3 DEDICATED SCHOOLS GRANT - 2024/25 UPDATE** (Pages 7 - 16)
- 4 FALLING ROLLS** (Pages 17 - 22)
- 5 GROWTH FUNDING AND FUTURE UPDATE PROPOSALS** (Pages 23 - 28)
- 6 ANY OTHER BUSINESS**
- 7 DATE OF NEXT MEETING**

THURSDAY 18TH JANUARY 2024

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SCHOOLS' FORUM

Minutes of the meeting held at 4.30 pm on 14 September 2023

Present:

David Dilling (Chairman)	Primary Academy Governor (Charles Darwin Academy Trust)
Patrick Foley	Primary Maintained Head Teacher (Southborough Primary School)
Neil Miller	PRU Head Teacher/Governor Academy (Bromley Trust Academy)
Steve Whittle	Secondary Academy Head Teacher (Impact Multi Academy Trust)
David Wilcox	Secondary Academy Governor (Darrick Wood School)

Also Present:

Jared Nehra	Director of Education
Kevin Walter	Democratic Services Officer

27 APOLOGIES FOR ABSENCE

Apologies for absence were received from David Bradshaw, Chris Hollands, Andrew Rees and Ian Travis.

A message was received from Claire Bessa stating that she is no longer able to attend Schools' Forum meetings.

28 MINUTES OF THE MEETING HELD ON 13TH JULY 2023

The minutes of the meeting held on 13th July 2023 were approved and signed as a correct record.

29 UPDATE ON THE CONSTITUTION

The Director of Education confirmed that the Children, Education and Families Policy Development and Scrutiny (PDS) Committee met on 13th September to discuss the report on the revised Constitution of the Schools' Forum (as agreed and put forward at the Schools' Forum meeting on 13th July). The PDS Committee agreed to the amendments and the revised Constitution was now formally in place.

Schools' Forum members were informed that comment had been made at the PDS Committee regarding the reduction in members of the Schools' Forum, with the Committee noting and acknowledging the challenges around securing sufficient membership and representation.

RESOLVED: That the update on the Constitution be noted.

30 GLA FREE SCHOOL MEALS

The Director of Education provided an update on the Greater London Authority (GLA) Universal Free School Meals Scheme, with the report confirming the current position in respect of the scheme. Members noted that the funding level had been set at £2.65 per meal. Concerns had been expressed by Bromley school leaders, including Academy and Local Authority maintained schools, that the funding was below the costs incurred by the schools. Although concerns about the implications of delivering the scheme at short notice had also been noted, no schools had chosen to opt out.

As per Appendix A in the report, the initial allocation of funding had now been made to Bromley schools. This was based on a 90% take-up rate of pupils not eligible for benefit related FSM (based on May Census data). Additional funding could be sought from the GLA scheme if take-up exceeded 90%. The Director of Education confirmed that the second tranche of funding would be in December 2023 and the third tranche in April 2024.

A Forum member commented that it was felt that there was a significant issue with the GLA scheme with schools being under-funded due to the actual cost of providing FSM being higher than the funding level set. Staffing and equipment implications were also a consideration. Additionally, Secondary School pupils were missing out under the GLA scheme.

In response, the Director of Education agreed that the scheme was not 'universal' free school meals as it is only being provided to Key Stage 2 pupils and therefore there are five Secondary year groups currently not included, up to the age of 16 (year 11).

A question was raised regarding the monitoring of the uptake of the GLA scheme and any 'clawback' conditions for money paid out to schools. In response, the Director of Education confirmed that this had been an area of concern raised with the DfE and the GLA. The initial proposal was that there would be a system to recover any funding not fully utilised. This would have required the local authority to implement a new system to monitor the uptake of FSM through the new scheme and to 'clawback' any monies not required. The GLA subsequently confirmed that there would not in fact be any 'clawback' mechanism for the funding provided throughout the year.

The Director of Education informed members that if schools could evidence take-up of the GLA scheme above 90% then the Authority could contact the GLA to request further funding.

RESOLVED: That the allocation of the UFSM grant to Bromley schools be noted and a further update will be provided at a future Schools' Forum meeting.

31 EARLY YEARS CONSULTATION

The Director of Education introduced the report on the DfE Early Years Consultation and informed Forum members that unfortunately the timing of the DfE's consultation period had not allowed for a discussion at a Schools' Forum meeting prior to a response being provided.

The local authority consulted with various agencies, including Early Years providers and the London Early Years Group, to help inform Bromley's response to the plans. A London-wide response had also been provided which was very similar to that provided by Bromley.

The Forum's attention was drawn to Appendix A of the report, showing Bromley's response, setting out concerns and support for the proposals put forward by the DfE. Although the consultation period had now closed, any comments/views could still be expressed and put forward via other channels.

The Director of Education confirmed that he felt that Bromley had provided a balanced response, given the difficulty of obtaining feedback from various providers/groups over the summer period timeframe of the consultation period. Bromley had expressed its views covering the key points, and it is hoped that there might be further opportunities for the DfE to take on board local viewpoints. The Director and others involved were thanked for their efforts in seeking views and putting the responses together.

RESOLVED: That the update and consultation response provided to the DfE be noted.

32 ANY OTHER BUSINESS

There were no additional items to discuss.

33 DATE OF NEXT MEETING

It was noted that the next meetings of the Schools' Forum would take place on Thursday 30th November 2023 and Thursday 18th January 2024 via MS Teams (subject to change).

The Meeting ended at 4.55 pm

Chairman

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Report No.
CEF23067

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **SCHOOLS' FORUM**

Date: **Thursday 30 November 2023**

Decision Type: Non-Urgent Non-Executive Non-Key

Title: **2024/25 DEDICATED SCHOOLS GRANT PROVISIONAL ALLOCATION**

Contact Officer: Julie Crew, Education Funding Manager
Tel: 020 8603 3573 E-mail: Julie.Crew@liberata.com

Chief Officer: Executive Director of Children's Services

Ward: (All Wards);

1. Reason for report

This report provides an outline of the estimated DSG allocation for 2024/25 and an overview of how this will be spent,

2. **RECOMMENDATION(S)**

2.1 **The Schools Forum is asked to review the provisional DSG income and forecast expenditure for 2024/25 in preparation for the full budget setting process.**

3. COMMENTARY

3.1 The indicative Dedicated Schools Grant (DSG) funding for 2024/25 has now been provided to all LAs – this is currently based on October 2022 pupil numbers so will be uplifted in December to reflect the October 2023 census data. The DSG for 2024/25 is divided into four blocks – High Needs, Early Years, Schools and Schools Central. The expected income is detailed below:

2024/25 Dedicated Schools Grant					
	High Needs Block	Early Years Block	Schools Block	Schools Central Block	Total
Gross Grant Funding	76,587,926	26,173,183	268,829,762	2,020,016	373,610,887
Recoupment adjustment	-11,358,336		- 2,058,472		- 13,416,808
Net Grant Allocation	65,229,590	26,173,183	266,771,290	2,020,016	360,194,079

3.2 The LA has looked at each of these blocks and has forecast the related expenditure for 2024/25 based on information that is currently available at this time. Full details of the projected grant income and expenditure can be seen at Appendix 1 with detailed information regarding each block provided below.

3.3 Appendix 2 shows the allocation from DfE which excludes the Early Years Block.

3.4 The Early Years block grant has not been announced by Government as yet. A grant figure has been generated by using the latest usage figures and using the recently announced enhanced rates of payment.

3.5 The expenditure below is provisional at this point and will be subject to review once the announcements on funding have been made.

3.6 Schools Central Block

Grant 2024/25	£2,020,016
Expenditure 2024/25	£2,580,016
Contribution from Council	(£560,000)
Expected (Over)/ Underspend	£0

The Schools Central Block is shows a provisional overspend of £560k which is proposed will be met by a contribution of £560k from the Council to offset the statutory duties that sit within the service. Officers will continue to work towards bringing this expenditure in line with the grant.

3.7 Early Years Block

Grant 2024/25	£26,173,183
Expenditure 2024/25	£26,173,183
Expected (Over)/ Underspend	£0

The Early Years Block income has been estimated as part of the separate review carried out by the LA and the income has been estimated as the DfE has not yet released any funding information relating to 2024/25.

The funding calculation also allows for £500k to be transferred from the EY block to the HN Block to support EY pupils with SEND.

3.8 Schools Block

Grant 2024/25	£268,829,762
NNDR Recoupment	£2,058,472
Expenditure 2024/25	£266,771,290
Expected (Over)/ Underspend	£0

The Schools Block funding has been calculated using the October 2022 census pupil numbers and the per pupil units of funding which have been calculated for 2024/25. Based on the published figures the Primary unit of funding has increased from £4,846 to £5,064 which is an increase of around 4.5% and the Secondary unit of funding has increased from £6,410 to £6,757 which is an increase of around 5.4%. This includes the incorporation of the Mainstream Schools Additional Grant (MSAG) distributed to schools in 2023/24.

3.9 The funding that the LA is allocated for the schools' block is calculated by running the NFF for every school to give a total figure, which is then divided by the number of pupils in each sector to give a per pupil figure.

3.10 The key changes to the NFF for 2024/25 are as follows:

- a) Introducing a new formulaic approach to allocating split sites funding in the NFF, replacing the former locally determined factor.
- b) Funding previously received through the Maintained Schools Additional Grant will be rolled into the NFF to fund mainstream schools for pupils from Reception to year 11 by
 - adding an amount representing what schools receive through the grant into their baseline.
 - adding value of lump sum, basic per pupil rates and FSM6 parts of the grant onto the respective factors in the NFF
- c) Increasing NFF factor values by
 - 1.4% to the following factors: basic entitlement, LPA, FMS6, IDACI, EAL, mobility, sparsity and the lump sum
 - 1.4% to the minimum per pupil levels (MPPL)
 - 0.5% to the floor funding
 - 1.6% to the FSM factor value
 - 0% on the premises factors.
- d) Introduction of a methodology for calculating and allocating funding for falling rolls.

- e) Provisionally, the baseline for floor funding notional NFF allocations increased by 2.05% for Primary and secondary from 2023-24, as a result of rolling the MSAG into the NFF.
- f) Minimum per pupil funding levels are compulsory and have been set at £4,610 for primary schools and £5,995 for secondary schools
- g) The MFG level is required to be between 0.0% and 0.5%

The funding formula has been run for all Bromley schools taking into account these changes.

- 3.11 Bromley has used the minimum funding levels as part of the formula calculation as compulsory requirement. 12 primary schools eligible for MFG protection of £725k. This is a provisional figure which will change when the October 2023 census is released in December 2023
- 3.12 The MFG level that has been used by Bromley is 0.5% which is the highest of the Government's parameters.
- 3.13 There will be a separate grant for teachers' pay made to cover pay increases in 2023-2024 and 2024-2025.

3.14 High Needs Block

Grant 2024/25	£76,587,926
Recoupment	-£11,358,336
LA Expenditure 2024/25	£70,860,590
Expected (Over)/ Underspend	(£5,631,000)

The High Needs Grant has increased by £2.2m from 2023/24, this includes the £2.8m supplementary grant that has now been rolled up into the baseline and will not be shown as a separate element of the grant in 2024/25.

- 3.15 There continue to be significant pressures on the High Needs Block. Estimated expenditure is based on the pattern of new EHCPs (Education, Health and Care Plans) seen over recent years and on the average cost of a placement. The demand for placements of children and young people with SEN continues to increase, although there has been a marked reduction in the rate of increase over the past 12 months. Increased numbers of children and young people have been placed at mainstream schools, special schools and resourced provisions in line with their needs. Nevertheless, the sustained increase in demand results in the continued reliance on independent and out of borough settings for children with complex needs where there is insufficient specialist capacity within Bromley.
- 3.16 The LA felt it was important to share this information with the Schools Forum at the earliest opportunity. Schools Forum members are asked to review this information in advance of the full budget setting process in December 2023. All of the figures are subject to change as further data is received and grant levels are amended.

2024/2025 DSG Provisional

High Needs Block	2024/25 Provisional	Early Year Block	2024/25 Provisional	Schools Block	2024/25 Provisional	Central Schools Services Block	2024/25
Income							
Baseline	68,089,264	EY Pupil numbers	4,971	Primary Pupil Numbers	27,212	Pupil Numbers	46,301
HN Pupil numbers		Baseline £ Per Pupil	6.07	Baseline £ Per Pupil	5,064	Baseline £ Per Pupil	43.63
Baseline £ Per Pupil	5,686,834	hours (15 x 38)	570	Total Primary Funding	137,793,092	Central Schools Services Funding	2,020,016
import/export	1,728,000	3 & 4 Years Old Funding	17,198,541				
Hospital & TPG/TPECG	1,077,829			Secondary pupil numbers	19,090		
Additional funding for Special Free Schools	6,000	EY Pupil numbers	1,867	Baseline £ Per Pupil	6,757		
Supplementary allocation	0	Baseline £ Per Pupil	6.07		128,981,951		
High Needs Block Restated	76,587,926	hours (15 x 38)	570	Premises	2,054,719		
		3 & 4 Years Old Additional 15 Hrs	6,459,011	Growth	0		
Academy Units@£6k	-2,033,500						
Academy Units@£10k	-52,500	EY Pupil numbers	418		268,829,762		
Academy Post-16 Units	-354,000	Baseline £ Per Pupil	9.41				
PRU Places Recoupment	-1,155,834	hours (15 x 38)	570				
BBA & Glebe	-3,855,834	2 Year Old Funding	2,242,028				
Special post 16	-566,667			NNDR recoupment	-2,058,472		
Hospital	-140,001	EY Pupil Premium	177,556				
Post 16 Transfer	-3,200,000	EY Disability Access Fund	96,048				
Total recoupment	-11,358,336						
DSG Grant Amount	65,229,590		26,173,183		266,771,290		2,020,016
Expenditure							
Delegated budgets		Universal	16,320,196	Academy Recoupment	255,378,058	Access and Admissions	527,820
Maintained Special Schools	4,130,000			Primary SBS	6,448,955	Licences	284,590
Maintained Special Schools top up	6,355,419	Additional 3 & 4 Year Old Hours	6,129,143	Secondary SBS	3,929,181	Capital	67,920
Academy Special School top up	5,654,130					Schools Forum	1,100
AP Top Up	2,051,981	2 Year Old Cost	2,258,705			Pupil Support Advisory Team	224,200
Units - Maintained Places	120,000					Support to Schools	51,410
- LA Funded Academy Places (vacant)	40,000					Business Support	140,930
- LA Funded Academy Places	150,000	EY Pupil Premium	177,556			Workforce Development	22,400
- Maintained Top Up	86,660					Schools standard	134,350
- Academy Top Up	1,774,580					Access to Education Management	50,000
Hospital	89,079					Education Welfare Service	545,690
TPG/TPECG	988,750					Asset Management	89,520
Supplementary Grant to settings 2023/24	861,655	Central Costs				Statutory/Regulatory Duties	240,086
Free School	18,000						
LA Centrally Managed		EY Admin Team	165,535	Contingency	671,693		
Darrick Wood HIU	1,183,266	SEN Support in Pre Schools	526,000	Falling rolls	343,403	To High Needs re centrally employed teachers	200,000
Darrick wood Deaf centre	1,296,929	Additional HN exp	500,000			Council Statutory duties	-560,000
AP Recoupment	-105,770						
Progression Courses	497,984						
Home and Alternative Provision	1,358,133						
SEN Support in Mainstream	423,875	EY Disability Access Fund	96,048				
SEN funding in Schools	5,978,080						
Outreach and Inclusion	1,169,227						
Specialist Support and Disability	268,832						
Complex Needs Team	792,813						
Phoenix Pre School Service	832,009						
SEN Transport	230,000						
Special Central	1,127,133						

Other Statemented	1,235,105			
SEN Out of Borough Fees	26,223,150			
SEN in Further Education Colleges	6,718,971			
Special Capital	10,600			
Supplementary allocation 2022/23	0			
Funded by EY Block	-500,000			
Funded by CSS Block	-200,000			
Total	70,860,590	26,173,183	266,771,290	2,020,016
In year deficit estimate	-5,631,000			
Variance	-0	-0	0	-0

Provisional schools NFF funding in 2024-25 [Note 1]				
LA number	LA name (alphabetical order within region)	Actual primary unit of funding (PUF)	Actual secondary unit of funding (SUF)	Primary pupil numbers (2023-24 DSG schools block, duplicates apportioned) [will be updated]
		[a]	[b]	[c]
305	Bromley	£5,064	£6,757	27,212

			Provisional high needs NFF funding in 2024-25 [Note 2]		
Secondary pupil numbers (2023-24 DSG schools block, duplicates apportioned) [will be updated]	Actual 2024-25 funding through the premises factors	Provisional NFF 2024-25 schools block funding (excluding funding through the growth factor) [will be updated]	Elements of the high needs NFF 2024-25 allocations included in the funding floor and gains calculation (total cash and excluding the basic entitlement factor, the	Number of pupils in special schools/academies [will be updated]	ACA-weighted basic entitlement unit rate (£4,660 per pupil)
[d]	[e]	$[f] = ([a] \times [c]) + ([b] \times [d]) + [e]$	[g]	[h]	[i]
19,090	£2,054,719	£268,829,761	£68,089,264	1121	£5,075

Basic entitlement factor [will be updated]	Net number of imported (+) or exported (-) pupils/students	Additional funding for new and growing special free schools [will be updated]	Import/export adjustments (£6,000 per pupil/student), including adjustments in relation to new and growing special free schools [will be updated]	Hospital education [may be updated] and historic pay and pension grant funding factor	Provisional high needs NFF allocations for 2024-25 (total cash) [will be updated]
[j] = [h] x [i]	[k]	[l]	[m] = [k] x £6,000 + [l]	[n]	[o] = [g] + [j] + [m] + [n]
£5,686,834	288	£6,000	£1,734,000	£1,077,829	£76,587,927

Provisional CSSB NFF funding in 2024-25 [Note 3]				Provisional total NFF funding 2024-25 [Note 4]
Actual CSSB unit of funding for ongoing responsibilities	Pupil numbers (2023-24 Schools block DSG duplicates apportioned) [will be updated]	Expected actual funding for historic commitments for 2024-25 (prior to protection applied in the DSG) [may be updated]	Provisional NFF 2024-25 CSSB funding [will be updated]	Provisional NFF 2024-25 allocations for schools, high needs and central school services blocks [will be updated]
[p]	[q] = [c] + [d]	[r]	[s] = ([p] x [q]) + [r]	[t] = [f] + [o] + [s]
£43.63	46,301	£0	£2,020,016	£347,437,704

Report No.
CEF23066

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **SCHOOLS FORUM**

Date: **30th November 2023**

Decision Type: Non-Urgent Executive Non-Key

Title: **FALLING ROLLS FUNDING AND FUTURE PROPOSALS**

Contact Officer: Julie Crew, Education Funding Manager
Tel. 020 8603 3573 E.Mail: julie.crew@liberata.com

Chief Officer: Jared Nehra, Director of Education

Ward: (All Wards);

1. Reason for report

1.1 The Department for Education (DfE) has updated guidance on Falling Rolls funding.

2. RECOMMENDATION(S)

2.1 **The Schools Forum are requested to:**

Review the guidance for Growth and Falling Roles and:-

(i) Decide whether a Falling Rolls Fund should be maintained for 2024/25;

If the decision is yes then:-

(ii) Agree the recommended amendments to the current scheme as detailed in the body of the report;

(iii) Note that the decision for final release of any funding rests with the Director of Education once the final evidence has been obtained from schools.

Corporate Policy

1. Policy Status: Not Applicable
 2. BBB Priority: Health and Integration
-

Financial

1. Cost of proposal: Not Applicable:
 2. Ongoing costs: Not Applicable:
 3. Budget head/performance centre: Various DSG cost centres
 4. Total current budget for this head: £11.4m after recoument
 5. Source of funding: DSG Budgets
-

Staff

1. Number of staff (current and additional): N/A
 2. If from existing staff resources, number of staff hours: N/A
-

Legal

1. Legal Requirement: Statutory Requirement
 2. Call-in: N/A
-

Customer Impact

1. N/A
-

Ward Councillor Views

1. Have Ward Councillors been asked for comments? Not Applicable
2. Summary of Ward Councillors comments: N/A

3. COMMENTARY

DfE Falling Rolls Scheme

- 3.1 For the first time in 2024/25 DfE will allocate funding based on falling rolls.
- 3.2 Falling rolls will be distributed based on the reduction in pupil numbers that the LA experience for each year. The falling rolls allocation for each LA will be £140,000 per Middle Layer Super Output Area (MSOA) which sees 10% or greater reduction in the number of pupils on roll between the two census years. The allocation will also be subject to Area Cost Adjustment (ACA).
- 3.3 Bromley will continue to have discretion over whether to operate a falling rolls fund. Where LAs continue to operate a fund, they will only be able to provide funding where school capacity data 2022 (SCAP) shows that school places will be required in the subsequent three to five years.
- 3.4 The requirement that schools must be Ofsted rated 'Good' or 'Outstanding' to be eligible for falling rolls funding will not longer apply from the 2024/25 financial year.
- 3.5 Local authorities, working closely with other responsible bodies, will want to manage the local school estate efficiently and reduce or find alternative uses for high levels of spare capacity, to avoid detriment to the educational offer or financial position of schools in the area.
- 3.6 Falling rolls funding should only be used to support schools where the places are forecast to be needed over the short-medium term.

Current Funding Criteria

- 3.7 The current criteria used by Bromley for Falling rolls allocations is as follows:-

Part A

- Support is available only for schools judged Good or Outstanding at their last Ofsted inspection (this is a mandatory requirement)
- Surplus capacity exceeds 20% of the published admission number (PAN)
- No funding to be paid where schools are already being supported through the existing growth fund or to free schools which are funded on estimated pupil numbers.

Part B

- Local planning data shows a requirement for at least 80% of the surplus places in the next 3 years.
- Formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort – school to provide copy of 3-year budget data to support this
- The school will need to make redundancies in order to contain spending within its formula budget – school to provide evidence of formal discussions at governing body level to support this.
- To be funded at the AWPU value per vacant place, up to a specified maximum number of places equivalent to 80% of PAN.

New Funding Criteria

- 3.8 The proposed funding criteria for falling rolls is as follows. Funding criteria should contain clear objective trigger point for qualification and a clear formula for calculating allocations.
- SCAP must show that school places will be required in the subsequent three to five years (this is a mandatory requirement).
 - Surplus capacity should exceed a minimum number of pupils.
 - Formula funding available to the school will not support provision of appropriate curriculum for the existing cohort.
 - Redundancies will need to be made to contain spending within the formula budget and it is expected that the posts will be refilled in the subsequent three to five years.
- 3.9 Methodology could include:
- A rate per vacant place, up to a specified maximum place number.
 - Lump sum payment with clear parameters
- 3.10 Forums need to agree the value of the fund and the criteria for allocation. The LA should consult the Schools Forum before expenditure is incurred.
- 3.11 The amount of funding will be proposed at the meeting in January for the DSG budget setting following on from the publication of the October census data by DfE

4 BROMLEY POSITION

- 4.1 Although Bromley will be allocated Falling rolls funding in 2024/25 via the DfE funding mechanism, it is important to note that there is no requirement for a Falling Rolls fund. This is a decision for the Schools Forum.
- 4.2 If the Schools Forum agree to continue with a Falling Rolls fund, it is recommended that the new criteria be merged into the current criteria to make it compliant with DfE requirements.
- 4.3 It is proposed to pay any eligible schools in the same way as this meets the criteria set out by DfE.
- 4.4 Bromley has estimated the falling rolls fund using the current methodology from the January 2023 census. There are potentially 14 schools that could be eligible for falling rolls through this calculation.
- 4.5 However actual grant funding from DfE and potential falling rolls fund set aside will be based on the October 2023 census data. This will be published in December and the actual amount to be set aside will be consulted upon at the Schools Forum in January 2024 when we have the most up to date data and funding available.
- 4.6 It should be noted that there has been extremely low take up of falling rolls funding in the past. It is likely that any funding set aside will reflect this. This will free up funding that can be directed to schools via the main formula.

5. FINANCIAL IMPLICATIONS

5.1 The financial implications are in the body of the report.

Non-Applicable Sections:	Legal Implications Policy Implications Personnel Implications Customer Implications
Background Documents: (Access via Contact Officer)	Documents held with Liberata Finance

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Report No.
CEF23065

London Borough of Bromley

PART ONE - PUBLIC

Decision Maker: **SCHOOLS FORUM**

Date: **30th November 2023**

Decision Type: Non-Urgent Executive Non-Key

Title: **GROWTH FUNDING UPDATE AND FUTURE PROPOSALS**

Contact Officer: Julie Crew, Education Funding Manager
Tel. 020 8603 3573 E.Mail: julie.crew@liberata.com

Chief Officer: Jared Nehra, Director of Education

Ward: (All Wards);

1. Reason for report

1.1 The Department for Education (DfE) has updated guidance on Growth Funding.

2. RECOMMENDATION(S)

2.1 The Schools Forum are requested to:

(i) Note the guidance from DfE on the Growth grant funding element of the DSG.

Corporate Policy

1. Policy Status: Not Applicable
 2. BBB Priority: Health and Integration
-

Financial

1. Cost of proposal: Not Applicable:
 2. Ongoing costs: Not Applicable:
 3. Budget head/performance centre: Various DSG cost centres
 4. Total current budget for this head: £11.4m after recoument
 5. Source of funding: DSG Budgets
-

Staff

1. Number of staff (current and additional): N/A
 2. If from existing staff resources, number of staff hours: N/A
-

Legal

1. Legal Requirement: Statutory Requirement
 2. Call-in: Not Applicable
-

Customer Impact

1. N/A
-

Ward Councillor Views

1. Have Ward Councillors been asked for comments? Not Applicable
2. Summary of Ward Councillors comments: Not applicable

3. COMMENTARY

DfE Growth Scheme

- 3.1 Growth funding is allocated through the national funding formula (NFF) within each local authority's school block. Unlike the other factors in the NFF, a provisional growth allocation is not published.
- 3.2 The growth allocation for each local authority will be £1,550 per new primary pupil and £2,320 per new secondary pupil, plus a lump sum of £76,195 for each brand-new school (these are new schools identified from the latest census data). Allocations are subject to an area cost adjustment (ACA).
- 3.3 **The growth fund can only be used to:**
- support growth in pre-16 pupil numbers to meet basic need.
 - support additional classes needed to meet the infant class size regulation.
 - meet the revenue cost of new schools.
- 3.4 LAs will not need to submit a disapplication request for an increase to numbers where this is due to a change to the admission limit or a local reorganisation. LAs are required to produce criteria on which any growth funding is to be allocated, which must be agreed by the Schools Forum.
- 3.5 The Schools Forum must also be consulted on the total size of the growth fund from each phase and should be consulted prior to any expenditure from the growth fund being incurred.
- 3.6 LAs will continue to set criteria to determine how to allocate growth funding to schools in their local area.
- 3.7 **The growth fund must not be used to support:**
- schools in financial difficulty; any such support for maintained schools should be provided from a de-delegated contingency,
 - general growth due to popularity; this is managed through lagged funding. This includes cases where academies have admitted above pupil admission numbers (PAN) by their own choice.

From 2024 to 2025 local authorities will need to provide growth funding where a school or academy has agreed with the local authority to provide an extra class to meet basic need in the area (either as a bulge class or as an ongoing commitment).

- 3.8 As a mandatory requirement LA will provide support where a school or academy has agreed with the local authority to provide an extra class in order to meet basic need in the area (either as a bulge class or as an ongoing commitment).
- 3.9 As a mandatory minimum local authorities will have to provide funding to a level which is compliant with the following formula:

primary growth factor value (£1,550) x number of pupils x ACA
secondary growth factor value (£2,320) x number of pupils x ACA

- 3.10 Funding, either through the growth fund, or by adjusting pupil numbers in the APT, will need to be provided regardless of whether the additional class is within or outside of the PAN.
- 3.11 In addition to the compulsory criteria, compliant criteria would generally contain:
- additional support where a school has extended its age range.
 - support where a school has temporarily increased its PAN, by a minimum number of pupils, in agreement with the authority,
 - support for KS1 classes where overall pupil numbers exceed a multiple of 30, by a minimum number of pupils.
 - pre-opening costs, initial equipping allowance, or diseconomy of scale allowance, for new maintained schools and academies; including new academies where the school is opening in response to basic need.
- 3.12 Methodologies could include:
- lump sum payment with clear parameters for calculation (usually based on the estimated cost of making additional provision for a new class or the estimated start-up costs)
 - per-pupil rate (usually based on age weighted pupil unit (AWPU), and reflecting the proportion of the year which is not funded within the school's budget share)
 - per-pupil rate, with a maximum ceiling
- 3.13 Where schools have agreed an expansion in pupil numbers with the local authority, the school should ensure that they understand the methodology for funding the increase and are content that the expansion is deliverable within the funding available.
- 3.14 LAs should report any unspent growth funding remaining at the year end to the Schools Forum.
- 3.15 Funding may be carried forward to the following funding period. As with any other centrally retained budget, and LA can choose to use it specifically for growth.
- 3.16 Any overspend growth funding will form part of the overall DSG surplus or deficit balance.

4. BROMLEY POSITION

- 4.1 Although there is no change to the current regulatory position, it is important that Schools Forum understand the mechanisms that drive the growth grant funding. The growth grant allocation is based on an amount per new primary pupil and per new secondary pupil, plus a lump sum amount for each brand-new school.

Calculation Step	Description
1. Total Funding for primary growth	Total Primary LA growth count x £1,550 x ACA
2. Total funding for secondary growth	Total secondary LA growth count x £2,320 x ACA
3. Total new schools funding	New schools count x £76,195 x ACA
4. Total growth allocation	1 + 2 + 3

- 4.2 In recent years there has been sustained growth in pupil numbers which has been dealt with by adding whole forms of entry which requires up to 7 years funding. The funding received

from DfE supports this additional funding being passed to schools through the core funding calculations.

- 4.3 Bromley is experiencing low growth pressure now, but growth has been a significant issue in past years and is likely to be in the future due to cyclical nature of school rolls.
- 4.4 Growth funding is a mechanism through which Bromley are funded for not only growing schools but also bulge classes, which is not core funding.
- 4.5 Bromley will continue to fund bulge classes by calculating an amount using AWPU and deprivation funding. An example of this is below:-

Example: Class of 30 Bulge pupil numbers.

Using the percentage of deprived pupils in the school and multiply by the following factors:-

- a) Deprivation
- b) FSM
- c) Prior Attainment
- d) EAL

In addition, each pupil in the bulge class will attract full AWPU funding.

- 4.6 There are currently only 2 schools attracting bulge class funding.
- 4.7 Any residual funding from the growth funding (growing schools and bulge classes) is absorbed into the in-year Schools Block calculation.
- 4.8 The growth funding allocation to schools will be finalised in December 2023 allocations from ESFA

5. FINANCIAL IMPLICATIONS

- 5.1 The Growth fund from DfE is an element of the overall DSG allocation within the Schools Block. It is a mechanism to fund schools via the Local Authority. The funding of Schools for growing schools and bulge classes uses this funding but the two do not necessarily co-relate. Although the funding stays within the Schools Block it may not necessarily be used for growth and may be absorbed into other areas of the Schools Block depending on what funding decisions are made. Conversely, more growth funding may be distributed than grant given.
- 5.2 The remaining financial implications are in the body of the report.

Non-Applicable Sections:	Legal Implications Policy Implications Personnel Implications Customer Implications
Background Documents: (Access via Contact Officer)	Documents held with Liberata Finance

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