

| | | | | | |
|--------------|---|------------------------|-----|------------------------|--------------------|
| Time | 4.00 pm | Public Meeting? | YES | Type of meeting | Partnership Boards |
| Venue | Committee Room 3 - 3rd Floor - Civic Centre | | | | |

Membership

| | |
|--------------------------|---|
| Karen Preston (Chair) | Academies Sector Representative |
| Susan Lacey (Vice Chair) | Nursery Sector Head Teacher Representative |
| Darryl Asbury | Academies Sector Representative |
| Kirsty Banks | Academies Sector Representative |
| Rachael Brown | Pupil Referral Unit Headteacher Representative |
| Ian Browne | 16 - 19 Education Representative |
| Vivienne Bunce | Special School Sector Governor Representative |
| Linda Campbell | Nursery Sector Governors Substitute |
| Kate Charles | Primary Sector Substitute |
| Amarjit Cheema | Academies Sector Substitute |
| Louisa Craig | Academies Sector Representative |
| Ben Davis | Academies Sector Representative |
| Lorraine Dawney | Special School Sector Substitute |
| Gary Gentle | Diocesan Representative Substitute |
| Trisha James | Primary Sector Governor Representative |
| Samantha Kemp-Marshall | Early Years (PVI Sector) Representative |
| Carroll McNally | Non-School Member Diocesan Schools Representative |
| Bhaksho Raj | Academies Sector Representative |
| Zoe Rollinson | Primary Sector Headteacher Representative |
| Emma Smith | Nursery Sector Headteacher Substitute |
| Stephen Smith | Primary Sector Governor Representative |
| Graham Tate | Academies Sector Representative |
| Lisa Thompson | Diocesan Schools Representative |
| Lucia Jayne Turner | Nursery Sector Governor Representative |
| Samantha Walker | Primary Sector Headteacher Representative |
| Lindsay Watson | Pupil Referral Unit Sector Substitute |
| Lisa-Anne Westwood | Academies Sector Representative |
| Sarah Whittington | Special School Sector Head Teacher Representative |
| Phil Williams | Academies Sector Representative |

Observer Status

| | |
|-------------------------|---|
| Councillor Chris Burden | Cabinet Member for Education and Skills |
| Bill Hague | Head of Business and Support Services |
| Brenda Wile | Deputy Director of Education |

Information for the Public

If you have any queries about this meeting, please contact:

Contact Shelley Humphries
Tel/Email 01902 554070 shelley.humphries@wolverhampton.gov.uk

Copies of other agendas and reports are available from:

Website <http://wolverhampton.cmis.uk.com/decisionmaking>
Email democratic.support@wolverhampton.gov.uk
Tel 01902 555043

Please take note of the protocol for filming, recording, and use of social media in meetings, copies of which are displayed in the meeting room.

Some items are discussed in private because of their confidential or commercial nature. These reports are not available to the public.

Agenda

Part 1 – items open to the press and public

- | <i>Item No.</i> | <i>Title</i> |
|-----------------|--|
| 1 | Welcome and Introductions |
| 2 | Apologies |
| 3 | Declaration of Interest or Confidentiality |
| 4 | Minutes of the Previous Meeting - 29 September 2022 (Pages 1 - 6) [To approve the minutes of 29 September 2022 as a correct record.] |
| 5 | Matters Arising [To consider any matters arising from the minutes of the meeting held on 29 September 2022.] |
| 6 | Schools' Forum Membership and Attendance Update (Pages 7 - 10) [To receive an update on current Schools' Forum membership and attendance.] |
| 7 | Schools' Forum Forward Plan 2022 - 2023 (Pages 11 - 12) [To note the Schools' Forum Forward Plan for academic year 2022 - 2023.] |

ITEMS FOR DISCUSSION OR DECISION

- | | |
|----|--|
| 8 | Growth Fund Update (Pages 13 - 46) [To note Growth Fund allocations for 2021 – 2022 and estimated allocations for 2022 – 2023 and 2023 – 2024.] |
| 9 | 2023-2024 National Funding Formula Provisional Allocations and Update on Budget Setting (Pages 47 - 58) [To note the NFF provisional allocations for 2023 - 2024 and budget setting processes.] |
| 10 | Maintained Nursery Supplement Update (Pages 59 - 60) [To receive an update on the use of annual surpluses in the Maintained Nursery Supplement of the Early Years Block of Dedicated Schools Grant.] |
| 11 | Update on the Impact of the Education MASH Officer - (To follow) [To receive an update on the impact of the Multi Agency Safeguarding Hub Officer post.] |
| 12 | High Needs Sub-Group Update [To receive an update from the Chair of the High Needs Sub-Group.] |
| 13 | Any Other Business |

14 **Dates for future meetings**

- 19 January 2023
- 16 February 2023

Attendance

Members of the Schools' Forum

| | |
|--------------------------|---|
| Karen Preston (Chair) | Academies Sector Representative |
| Susan Lacey (Vice Chair) | Nursery Sector Head Teacher Representative |
| Darryl Asbury | Academies Sector Representative |
| Rachael Brown (v) | Pupil Referral Unit Headteacher Representative |
| Louisa Craig (v) | Academies Sector Representative |
| Samantha Kemp-Marshall | PVI Early Years Representative |
| Zoe Rollinson (v) | Primary Sector Headteacher Representative |
| Graham Tate (v) | Academies Sector Representative |
| Lucia Jayne Turner (v) | Nursery Sector Governor Representative |
| Samantha Walker | Primary Sector Headteacher Representative |
| Lisa-Anne Westwood (v) | Academies Sector Representative |
| Sarah Whittington | Special School Sector Head Teacher Representative |
| Phil Williams (v) | Academies Sector Representative |

Observer Status

| | |
|------------|--|
| Bill Hague | Head of School Business and Support Services |
|------------|--|

In Attendance

| | |
|-------------------|-----------------------------|
| James Barlow | Finance Business Partner |
| Shelley Humphries | Democratic Services Officer |

Part 1 – items open to the press and public

Item No. *Title*

- Welcome and Introductions**
- Election of Chair and Vice Chair**
Members of Schools' Forum were invited to elect a new Chair and Vice Chair of Schools' Forum for academic year 2022 - 2023.

Following nominations and elections, it was agreed that Karen Preston and Susan Lacey be elected as Chair and Vice Chair respectively.

All members of Schools' Forum present agreed to these elections and thanks were recorded for Stephen Smith's support as the previous Vice Chair over the years.

Resolved:

1. That Karen Preston be appointed as Chair of Schools' Forum for academic year 2022 - 2023.
2. That Susan Lacey be appointed as Vice-Chair of Schools' Forum for academic year 2022 - 2023.

3 **Apologies**

Apologies were received from Schools' Forum members Vivienne Bunce, Ben Davis, Gary Gentle, Lisa Thompson and Stephen Smith.

4 **Declaration of Interest or Confidentiality**

There were no declarations of interest or confidentiality.

5 **Minutes of the Previous Meeting - 7 July 2022**

Resolved:

That the minutes of the meeting of 7 July 2022 be approved as a correct record.

6 **Matters Arising**

In respect of maintained nursery supplement funding carry forward described at minute 5, it was acknowledged that these had been received with thanks. It was requested that, in the spirit of transparency, further detail be communicated around whether all allocations had now been paid, how much had been identified and how decisions around allocations had been reached. It was agreed that finance colleagues would explore this then release a communication; a report would then be provided at the next meeting to be formally noted.

In respect of the resolution of minute 7, for clarity, it was noted that the report on Future Resourcing for Wolverhampton Exploitation and Missing Hub was relevant to knife crime as this was included in the scope of the Exploitation Hub.

Resolved:

That a communication be released detailing the allocations of the carry forward pertaining to maintained nursery supplement funding and methodology used followed by a report at the next meeting of Schools' Forum.

7 **Schools' Forum Membership 2022 - 2023 Update**

Bill Hague, Head of School Business and Support Services presented the Schools' Forum Membership 2022 - 2023 Update.

It was acknowledged that members whose terms were coming to an end had been contacted and that steps were being taken to fill all other remaining vacancies.

Vivienne Bunce was named as the new Special School Governor Representative and was welcomed to the membership.

Resolved:

That the Schools' Forum Membership 2022 - 2023 Update be received.

8 **Schools' Forum Forward Plan 2022 - 2023**

Bill Hague, Head of School Business and Support Services presented the Schools' Forum Forward Plan 2022 – 2023 and highlighted future agenda items.

It was noted that the Update on the Impact of the Education MASH Officer report had been deferred to the December meeting pending further detail around funding.

Schools' Forum members were invited to suggest any items they wished to receive at future meetings by contacting either Bill Hague, Head of School Business and Support Services or Shelley Humphries, Democratic Services Officer.

Resolved:

That the Schools' Forum Forward Plan 2022 – 2023 be noted.

9 **Draft Schools' Forum Constitution 2022**

Bill Hague, Head of School Business and Support Services presented the Draft Schools' Forum Constitution 2022 for approval and it was reported that the document had undergone its annual review.

It was noted that there were no changes to the makeup of Schools' Forum since last year, although in anticipation of some academisations, it was thought this would change by next year.

A query was raised around Schools' Forum meeting attendance monitoring and it was agreed that a record would be kept of member attendance going forward. No further amendments were requested to the Constitution. A request was made to consider including some Governor members within the academy sector.

Resolved:

1. That Members of Schools' Forum note that there are no changes required to the makeup of Schools' Forum.
2. That Members of Schools' Forum agree to adopt Schools' Forum Constitution 2022.
3. That a record of Schools' Forum members' attendance be kept and reviewed.

10 **Devolved Formula Capital and School Budget Update**

James Barlow, Finance Business Partner presented the Devolved Formula Capital and School Budget Update report and highlighted salient points. The report detailed Devolved Formula Capital (DFC) balances held at 31 August 2022 within the Local Authority's maintained schools as well as the monitoring processes followed in reporting balances.

It was highlighted that the number of schools showing surplus balances for longer than three years was lower than a few years ago, which was positive.

It was confirmed that an email had been sent to all schools with surplus balances exceeding three years requesting plans for the use of the money by return. Taking

into account the current cost of living crisis, there had already been a number of discussions with schools around utility costs absorbing much of the surplus, which would work to the advantage of many schools. It was acknowledged, however that rising energy costs left schools with no surplus in a vulnerable position therefore the Council were engaged in conversation with energy providers around the impact for those schools using Council tariffs. Drop-in sessions had also been planned to offer advice and guidance to schools.

Resolved:

1. That the DFC balances held in schools at 31 August 2022 be noted.
2. That the update on school budget balances be noted.

11

Early Years Underspend Update

Bill Hague, Head of School Business and Support Services provided a verbal update on the allocation of Early Years Underspend.

It was noted that consultation with schools would be key to informing how to put the funds to the best use therefore it was proposed that a task and finish sub-group be established, comprising of both Council officers and school representatives, to explore options and finalise a set of proposals to report back to Schools' Forum.

This suggestion was met with approval and several members expressed a wish to contribute. It was acknowledged that, due to the impact of COVID, a cohort of young children had been left behind in some areas due to spending crucial early years isolated in lockdown without the benefit of classroom learning and peer group interaction. A means could be devised of using the funds to support this cohort.

It was agreed that a Terms of Reference for the sub-group would be drafted and submitted to Schools' Forum for approval.

Resolved:

1. That an Early Years Underspend Sub-group reporting to Schools' Forum be established to explore options and finalise a set of proposals for the use of the Early Years Underspend.
2. That a Terms of Reference document for an Early Years Underspend Sub-group would be drafted and submitted to Schools' Forum for approval.

12

Future Resourcing for Wolverhampton Exploitation and Missing Hub

Rachel King, Head of Specialist Support presented the Future Resourcing for Wolverhampton Exploitation and Missing Hub report and highlighted salient points. The report proposed a dedicated education post within the Partnership Exploitation and Missing Hub to be established and initially funded for 12 months out of the centrally retained Dedicated Schools' Grant. A report would then be presented to Schools' Forum in June 2023 to evidence the impact of the post and agree longer term funding.

It was acknowledged that this resource would establish a strong communication link between schools and the Exploitation Hub to help identify and support vulnerable children, such as those at risk of exclusion.

It was confirmed that, to ensure support was in place as soon as possible, the service would seek to appoint someone in the very near future meaning the funding would cross two financial years although it would be explored how to sustainably provide continuity.

Resolved:

1. That members of Schools' Forum agree for a dedicated education post to be established within the Partnership Exploitation and Missing Hub and for this to be funded for 12 months from the centrally retained Dedicated Schools' Grant at a cost of £45,500.
2. That members of Schools' Forum agree to receive an update report detailing the impact of the dedicated post in June 2023 in order to inform longer term funding for the post.

13 **Update on High Needs Block**

James Barlow, Finance Business Partner presented the High Needs Block Update September 2022 report and highlighted salient points. It was reported that in early 2022, the Government had announced £1.8 million of funding in addition to the previously announced budget allocations of December 2021.

It was also noted that the forecast overspend of the High Needs Block in Wolverhampton had been £1.7 million, however the actual overspend figure recorded was £380,000. Education and Skills Funding Agency (ESFA) guidance suggested that, where appropriate, this additional funding could be used to uplift matrix values to meet increased costs.

At the previous meeting of Schools Forum (7 July 2022) it had been proposed by the High Needs Sub-Group to approve the option to uplift the matrix banding on an individual level in schools by 3.5 %. This had been agreed, subject to the Update on High Needs Block report being formally submitted in September 2022.

It was noted that the uplift was most welcome due to the financial pressures faced to ensure that children with special educational needs and disabilities (SEND) received the most appropriate support and attended the setting that was right for their needs. It was acknowledged as an opportunity to make a difference.

Resolved:

That Schools' Forum members note that the High Needs Block matrix values will increase by from those previously published.

14 **High Needs Sub-Group Update**

In the capacity of Chair of the High Needs Sub-Group, Sarah Whittington, provided a verbal update on work undertaken by the Sub-Group.

It was reported that Education, Health and Care Plans (EHCP) records would be transferring over to the Capita system. It was noted that the annual review process was creating time pressures due to increased paperwork, however individual schools were utilising their own methods and working through as best they could.

It was noted that a High Needs Place Commissioning Capacity Group had been established, although there was nothing further to report from this group as yet.

Thanks and appreciation were recorded on behalf of Schools' Forum to the members of the High Needs Subgroup for their valuable work.

Resolved:

That the High Needs Sub-Group Update be received.

15

Any Other Business

There was no other business.

16

Date and format of the next meeting

It was agreed that the next meeting of Schools' Forum would take place on 1 December 2022 from 4.00 pm and that it would be held in hybrid format.

Members were however encouraged to attend in person and only attend virtually if this was not possible, as it was felt face to face engagement afforded more open discussion.

Resolved:

That the next meeting of Schools' Forum take place on 1 December 2022 from 4.00 pm and would be held in a hybrid format with the request that members attend in person where possible.

The Chair thanked all for attending and closed the meeting at 5:14 pm.

Schools' Forum Membership and Attendance 2022 - 2023

| Members | Nominated | Term Ends | 2022 | | | | | 2022-2023 |
|---|-----------|-----------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| | | | Teams | Teams | Teams | Teams | Hybrid | Hybrid |
| | | | 30-Sep-21 | 09-Dec-21 | 20-Jan-22 | 17-Feb-22 | 07-Jul-22 | 29-Sep-22 |
| Primary Headteacher / Representatives | | | | | | | | |
| Samantha Walker (Wodensfield Primary School) | 01.02.19 | Sep-25 | Present | Absent - No Sub | Present | Present | Present (v) | Present |
| Zoe Rollinson (Lanesfield Primary School) | 24.03.18 | Sep-24 | Present | Absent - No Sub | Present | Apols - Other Reprs Present | Present (v) | Present (v) |
| Primary Substitute | | | | | | | | |
| Kate Charles (Stow Lawn Primary School) | 16.09.19 | Sep-23 | Not Required - Rep Attended | Absent - No Rep | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended |
| Primary Governors Representative | | | | | | | | |
| Stephen Smith (Vice Chair) (Warstones Primary School) | 09.09.20 | Sep-23 | Apols - No Sub | Apols - No Sub | Apols - No Sub | Apols - Other Reprs Present | Present | Apols - No Sub |
| Trish James (Dovecotes Primary School) | 01.09.20 | Sep-23 | Absent - No Rep | Absent - No Rep | Absent - No Rep | Present | Present (v) | Absent - No Rep |
| Primary Governor Substitute | | | | | | | | |
| Vacancy | | | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy |
| Secondary Sector Headteacher / Representative | | | | | | | | |
| Andrea Stephens (Headteacher – Colton Hills Schools) | 17.02.21 | Sep-24 | Absent - No Sub | Present | Present | Absent - No Sub | Absent - No Sub | Absent - No Sub |
| Secondary Sector Headteacher Substitute | | | | | | | | |
| Vacancy | | | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy |
| Nursery Headteacher / Representative | | | | | | | | |
| Susan Lacey (Ashmore Park Nursery School) (Vice Chair) | 03.09.20 | Sep-23 | Apols - Sent Sub | Present | Present | Present | Present | Present |
| Nursery Headteacher Substitute | | | | | | | | |
| Emma Smith (Bilston and Eastfield Nurseries) | 19.01.22 | Sep-25 | Claire Foster attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended |

Schools' Forum Membership and Attendance 2022 - 2023

| Members | Nominated | Term Ends | 2022 | | | | | 2022-2023 |
|---------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| | | | Teams | Teams | Teams | Teams | Hybrid | Hybrid |
| | | | 30-Sep-21 | 09-Dec-21 | 20-Jan-22 | 17-Feb-22 | 07-Jul-22 | 29-Sep-22 |

| Nursery Governors | | | | | | | | | |
|--------------------------------------|----------|--------|---------|------------------|----------------|---------|-------------|-------------|--|
| Lucia Jayne Turner (Windsor Nursery) | 01.09.20 | Sep-23 | Present | Apols - Sent Sub | Apols - No Sub | Present | Present (v) | Present (v) | |

| Nursery Governors - Substitute | | | | | | | | | |
|--|----------|--------|-----------------------------|---------|-----------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| Linda Campbell (Low Hill Nursery School) | 13.11.20 | Sep-23 | Not Required - Rep Attended | Present | Absent - No Rep | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended |

| Special School Headteacher / Representatives | | | | | | | | | |
|--|----------|--------|---------|---------|---------|---------|---------|---------|---------|
| Sarah Whittington (Tettenhall Wood School) | 10.03.18 | Sep-24 | Present | Present | Present | Present | Present | Present | Present |

| Special School Headteacher Substitute | | | | | | | | | |
|---------------------------------------|----------|--------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| Lorraine Dawney (Green Park School) | 22.10.20 | Sep-23 | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended |

| Special School Governors Representative | | | | | | | | | |
|--|--------|--------|-------------|-------------|-------------|-------------|-------------|-------------|----------------|
| Vivienne Bunce (Chair of Governors, Penn Fields) | Sep-22 | Sep-25 | Rep Vacancy | Rep Vacancy | Rep Vacancy | Rep Vacancy | Rep Vacancy | Rep Vacancy | Apols - No Sub |

| Special School Governors Substitute | | | | | | | | | |
|-------------------------------------|--|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Vacancy | | | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy |

| Pupil Referral Unit Headteacher / Representatives | | | | | | | | | |
|--|----------|--------|---------|---------|---------|---------|---------|----------------|-------------|
| Rachael Brown (Executive Headteacher – Lawnswood Campus) | 06.02.20 | Sep-23 | Present | Present | Present | Present | Present | Apols - No Sub | Present (v) |

| Pupil Referral Unit Headteacher Substitute | | | | | | | | | |
|--|----------|--------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------|-----------------------------|
| Lindsay Watson (Lawnswood Campus) | 20.01.22 | Sep-25 | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Absent - No Rep | Not Required - Rep Attended |

Schools' Forum Membership and Attendance 2022 - 2023

| Members | Nominated | Term Ends | 2022 | | | | | 2022-2023 |
|---------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| | | | Teams | Teams | Teams | Teams | Hybrid | Hybrid |
| | | | 30-Sep-21 | 09-Dec-21 | 20-Jan-22 | 17-Feb-22 | 07-Jul-22 | 29-Sep-22 |

Non School Members

| Diocesan Schools Representatives (x2) | | | | | | | | | |
|--|----------|--------|-------------------|-----------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-------------|
| Carroll McNally (Holy Trinity Catholic) | 15.09.20 | Sep-23 | Absent - Sent Sub | Absent - No Sub | Present | Present | Present (v) | Present (v) | |
| Lisa Thompson (St Andrews C of E Primary School) | 25.02.21 | Sep-24 | Apols - Sent Sub | Apols - No Sub | Present | Present | Absent - Other Reps Present | Apols - Other Reps Present | |
| Diocesan Schools Substitute | | | | | | | | | |
| Gary Gentle (Bilston CE) | 01.09.20 | Sep-23 | Present | Apols - No Rep | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | Not Required - Rep Attended | |
| Vacancy | | | Rep Vacancy | Rep Vacancy | Rep Vacancy | Rep Vacancy | Rep Vacancy | Rep Vacancy | Rep Vacancy |
| Early Years (PVI Sector) Representative | | | | | | | | | |
| Samantha Kemp-Marshall | 27.06.22 | Sep-25 | Rep Vacancy | Rep Vacancy | Rep Vacancy | Rep Vacancy | Present | Present | |
| Early Years PVI Sector Substitute | | | | | | | | | |
| Elizabeth Towner | 27.06.22 | Sep-25 | Sub Vacancy | Sub Vacancy | Sub Vacancy | Sub Vacancy | Not Required - Rep Attended | Not Required - Rep Attended | |
| 15 -19 Education | | | | | | | | | |
| Ian Browne | 13.09.20 | Sep-23 | Present | Absent - No Sub | Absent - No Sub | Absent - No Sub | Apols - No Sub | Absent - No Sub | |

Observer Status Members

| LA Role | Representative |
|---|-------------------------------|
| Cabinet Member for Education, Skills and Work | Councillor Christopher Burden |
| Executive Director of Families | Emma Bennett |
| Deputy Director for Education | Brenda Wile |
| Head of School Business and Support Services | Bill Hague |

City of Wolverhampton Council

SCHOOLS' FORUM

| | |
|-------------------------|--|
| Date | 1 December 2022 |
| Report title | Schools' Forum – Forward Plan 2022 - 2023 |
| Contact Officer | Bill Hague, Head of School Business and Support Services |
| Telephone number | 01902 555100 |

Summary

This report outlines the Forward Plan for Schools' Forum for Academic Year 2022 - 2023.

It is good practice to have a forward plan to ensure that Forum members are aware of the schedule of reports that need to be considered and decisions made.

Decision

Members of the Schools' Forum are asked to note and comment on the Forward Plan (Appendix 1).

**Wolverhampton Schools' Forum
Forward Plan 2022 – 2023**

| Date of Meeting | Item Type | Responsible Officer |
|---|------------------|----------------------------|
| 1 December 2022 | | |
| Growth Fund Update | Information Item | David Kirby |
| 2023-2024 National Funding Formula Provisional Allocations and Update on Budget Setting | Decision Item | James Barlow |
| Maintained Nursery Supplement Update | Information Item | James Barlow |
| Update on the Impact of the Education MASH Officer | Information Item | Bill Hague |
| High Needs Subgroup Update | Information Item | Sarah Whittington |
| 19 January 2023 | | |
| Dedicated Schools Grant and School Funding 2023 – 2024 | Decision Item | James Barlow |
| 2023 – 2024 High Needs Place Commissioning | Decision Item | TBC |
| High Needs Subgroup Update | Information Item | Sarah Whittington |
| 16 February 2023 | | |
| High Needs Block Funding 2023 | Approval Item | James Barlow |
| Early Years Block Funding 2023 | Approval Item | James Barlow |
| Central Services Block Funding 2023 | Approval Item | James Barlow |
| Schools Block Funding 2023 | Approval Item | James Barlow |
| High Needs Subgroup Update | Information Item | Sarah Whittington |
| 29 June 2023 TBC | | |
| School Balances Update | Information Item | James Barlow |
| Dedicated Schools Grant Out-turn | Information Item | James Barlow |
| Future Resourcing for Wolverhampton Exploitation and Missing Hub - Update | Information Item | Rachel King |
| High Needs Subgroup Update | Information Item | Sarah Whittington |

City of Wolverhampton Council

SCHOOLS' FORUM

| | |
|------------------------|---|
| Date | 1 December 2022 |
| Report title | Growth Fund Update |
| Contact Officer | Dave Kirby, Service Manager School Organisation and Support |
| Contact | 01902 554152 / david.kirby@wolverhampton.gov.uk |

Summary

This report provides an update on the deployment of the 2021–2022 Financial Year Growth Fund payment and outlines estimated Growth Fund allocations in 2022-2023 and 2023-2024 Financial Year. Schools' Forum members are asked to reaffirm growth fund eligibility criteria in accordance with the relevant guidance from the Education Skills and Funding Agency (ESFA).

Decision

Members of Schools' Forum are asked to:

1. Note the 2021 - 2022 Growth Fund allocations (**Appendix 1**).
2. Note estimated 2022 - 2023 Growth Fund allocations (**Appendix 2**).
3. Note potential 2023 - 2024 Growth Fund allocations (**Appendix 3**).
4. Note the anticipated demand for both the Primary and Secondary estates and the need for future Growth Funds to support both phases.

Schedule of Background Papers

- [Secondary School Expansion Programme 2023 \(Cabinet Report – 16 November 2023\) Schools Forum \(9 December 2021\)](#)
- Schools' Forum (9 October 2014) Establishment of a Growth Fund to Support Expanding Schools (**Appendix 5**)

1.0 Background

- 1.1 Schools' Forum first agreed to the establishment of a Wolverhampton Growth Fund on 9 October 2014. In line with this agreement, a Growth Fund has been subsequently retained and deployed.
- 1.2 In 2019-2020, the DfE introduced allocating growth funding to local authorities on a formulaic basis: "In 2019-2020 we introduced a new methodology for the growth factor, designed to distribute this funding based on the actual growth that local authorities experienced between successive October censuses, rather than the amount they have historically chosen to spend." Growth allocation within the DSG is now based on pupil data from the October census, but Local authorities will continue to manage their growth funding locally. ('The national funding formula for schools and high needs 2020 to 2021', October 2019).
- 1.3 The updated guidance 'National funding formula for schools and high needs: 2022 to 2023' states "The basic structure of the schools national funding formula (NFF) is not changing in 2022-2023."
- 1.4 Experience has shown that Growth Fund provision is essential to expanding schools as the admission of significant numbers of additional pupils has clear revenue budget implications for the schools concerned (funding is based upon numbers on roll recorded within the preceding autumn term School Census). Without such provision expanding schools would face a likely shortfall in revenue funding until funding allocations reflect actual numbers on roll.
- 1.5 City schools currently qualify for funding through the Growth Fund in the following circumstances:
 - The school or academy has agreed with the Local Authority (LA) to permanently increase its admission limit to meet basic need.
 - The school or academy has agreed with the LA to provide a bulge class to meet basic need.
 - The school or academy has agreed with the LA to expand in-year to meet basic need.
- 1.6 Growth Funds may not be used to support either schools in financial difficulty or to meet the strategic aspirations of schools or trusts who wish to expand to meet their local objectives. This is as per ESFA guidance: "...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
- 1.7 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." (Growth and falling rolls fund guidance: 2020 to 2021 - February 2020. Please note this guidance is currently under review)

- 1.8 Please note that the adopted School Organisation strategy entitled 'City of Wolverhampton Education Place Planning 2020-2022' (the strategy) recommends that the LA works towards a 2% level of surplus places for both primary and secondary. This is consistent with the basic need funding allocated to LAs, as central government operate a funding level of 2% surplus. The strategy is currently being refreshed and the 2% level of surplus is being reviewed due to sustained and significant in year growth especially in the primary phase.
- 1.9 In all instances the principal basis for allocating additional funding through the Growth Fund is the number of additional children admitted **to meet basic need**; individual schools' funding rates are based upon the pupil led factors of the local funding formula. The Growth Fund also includes a guaranteed minimum level of funding to provide greater security to those schools who are expanding by half a form of entry or more to meet basic need. These schools would be guaranteed to receive at a minimum, the equivalent of the salary of a teacher at the midpoint of the teachers' main scale for each 30 additional places provided (this figure would be adjusted on a pro-rata basis depending on the number of additional places being provided).
- 1.10 Due to variations in school financial years, it is intended that allocations to maintained schools would reflect the period September to March, whilst allocations to academies reflect the period September to August.

2.0 Deployment Process

- 2.1 The LA confirms Growth Fund payments to schools once they have been processed. Schools are given the payment reference ID in order to track the receipt of these funds, along with a breakdown of the number of places for which they are being funded. An example of the email they receive is shown is **Appendix 4**.
- 2.2 DfE guidelines suggest that the Growth Fund must be employed on the same basis for the benefit of maintained schools and academies and this is reflected in the operation of the Wolverhampton Growth Fund.
- 2.3 **Model 1 – Standard Growth Fund Payment:** Schools permanently expanding from point of entry as set out in 1.5, will receive a Growth Fund payment which is always based on the Autumn census number on roll for point of entry (Reception for Primary and Year 7 for Secondary). The LA recognise that schools will have a shortfall in funding in the long term, until the increased Published Admission Number (PAN) is recorded in all year groups within the preceding Autumn term census (on which funding is based). For this reason, growth fund payments for permanent expansions will continue for seven years in primary schools and five years in secondary schools. This scenario can be illustrated by the example below.

Example: School A agrees with the LA to permanently increase its admission limit from 120 to 180 to meet basic need in time for Allocation Day. For the next seven (primary) or five (secondary) years, the schools' funding will not reflect the increase in PAN. Consequently, the LA will pay for any additional places filled at point of entry, above 120 (up to 180), which are recorded in the Autumn term census. See 1.9 and 1.10 for details of how the funding is calculated.

- 2.4 **Model 2 – One-off Standard Growth Fund Payment (temporary uplift starting in point of entry):** Schools introducing a temporary bulge from point of entry as set out in 1.5, will receive one Growth Fund payment based on Autumn census number on roll for

that particular cohort. The LA recognise that schools would be behind in their revenue funding in the short term, and for this reason they are paid growth fund for each additional place filled in Autumn census to make up for this temporary short fall. This scenario can be illustrated by the example below.

Example: School B agrees with the LA to provide an additional 15 places at point of entry to meet basic need, making its PAN 60. The school's funding will temporarily not reflect the increase in PAN until the following year, consequently the LA will pay for any additional places filled at point of entry, above 45 (up to 60), which are recorded in that Autumn term census. See 1.9 and 1.10 for details of how the funding is calculated.

- 2.5 **Model 3 – In-year Growth Fund Payment:** Schools temporarily uplifting their PAN in a year group other than point of entry, as set out in 1.5, will receive a Growth Fund payment based on the number on roll for that cohort in the next termly census. The number on roll for this cohort will continue to be tracked in termly censuses and funded, until all additional places are filled, up to the agreed PAN or until the cohort reaches the end of Year 6 or 11. This scenario can be illustrated by the example below.

Example: School C agrees with the LA to temporarily uplift its PAN from 60 to 66 in Year 3 to meet basic need. The school's funding will temporarily not reflect the increase in PAN, consequently the LA will pay for any additional places filled above 60 (up to 66) which are recorded in the following termly censuses, until the additional places in this cohort are filled. See 1.9 and 1.10 for details of how the funding is calculated.

3.0 Update on Deployment of 2021-2022 Growth Fund

- 3.1 On 9 December 2021, Schools' Forum agreed to the creation of a Growth Fund of £2,000,000 and it was reported that there would be a potential underspend (depending on places being filled).
- 3.2 The total expenditure for Financial Year 2021-2022 was £1,892,919.19 (resulting in a final underspend of £107,080.81). Please see **Appendix 1** for a breakdown of these payments.
- 3.3 There was an underspend from the 2020-2021 budget of £396,237.00, that was carried forward to 2021-2022; providing a total of £503,317.81 to be carried forward to 2022-2023.
- 3.4 Growth fund payments for Spring 2021 were paid in the 2021-2022 financial year and growth fund payments for Spring 2022 were paid in the 2022-2023 financial year.

4.0 Update on Deployment of 2022-2023 Growth Fund

- 4.1 In December 2021, the budget of £2,400,000 for 2022-2023 was approved. The carry forward from 2021-2022 provides a total budget of £2,903,317.81.
- 4.2 Payments for Spring 2022 based on Spring School census (which falls in the 2021-2022 financial year) were paid out to schools in the 2021-2022 academic year. Summer 2022 Growth Fund payments have already been paid. A breakdown of Spring and Summer 2022 payments can be found in the first two columns of **Appendix 2**.
- 4.3 Estimated remaining payments for Autumn 2022 and Spring 2023 are also detailed in **Appendix 2**. This is estimated to be £2,545,207.91.

- 4.4 Please note that at the time of this meeting, 2022 Autumn census data is currently being validated. Consequently, estimated payments detailed in **Appendix 2** are based on an indicative number on roll figure from 6 October 2022 and based on an assumption that any additional in-year places not filled at that point, would be filled in Spring 2023.
- 4.5 The estimated payments detailed in **Appendix 2** (subject to the caveats above) suggest that the growth fund allocation (with the carry forward from 2021-2022) of £2,903,317.81 will be sufficient. There is a projected underspend.
- 4.6 Any resources remaining in the Growth Fund at the end of the financial year 2022-2023 will be reported to Schools' Forum by colleagues in Finance and be considered as part of the overall 2022-2023 out-turn.

5.0 Deployment of the 2023 - 2024 Growth Fund

- 5.1 Please see **Appendix 3** for the requested budget for Growth Fund for 2023 – 2024, which is £1,406,000.
- 5.2 Although the estimated Growth Fund payments and contingency for any additional places that may be required, are calculated at £1,739,431.36, the anticipated underspend from 2022-2023 (£333,431.36) reduces the budget ask. Estimations are based on standard payments for Autumn 2023, with the assumption that all additional in-year places referred to in **Appendix 2** have been paid out in the previous financial year.
- 5.3 The ask for this financial year is lower than 2022-2023 as the peak in demand for Secondary school places (academic year 2022-2023) has passed. It is the intention to continue to use the existing transparent and consistent criteria under which schools qualify for funding as set out in 1.5 above. Any additional places will be introduced in line with the approved strategic policy as outlined in the School Organisation strategy.
- 5.4 Schools' Forum should note previously confirmed expansion programmes and in year growth requirements.
- 5.5 In order to ensure transparency it is proposed that any 2023 - 2024 Growth Fund deployments would once again be reported to Schools' Forum on a periodic basis.
- 5.6 Please note that it is anticipated there will be a requirement to deploy a Growth Fund in subsequent financial years to support the needs of pupils in expanding primary and secondary schools to meet basic need. The City attracts additional DSG funding as a result of the increased number of pupils in the system.
- 5.7 The proposed budget for the 2023-2024 Growth Fund will be presented to Schools' Forum for approval in January 2023.

6.0 Impact

- 6.1 The allocation of resources from the Dedicated Schools Grant impacts on the funding directed to schools.

2021-2022 Financial Year Growth Fund Allocations

| Establishment | Spring 2021 Growth Fund In-year Payment | Summer 2021 Growth Fund In-year Payment | Autumn 2021 Growth fund Standard Payment | Autumn 2021 Growth fund In-year Payment | Total |
|------------------------------------|---|---|--|---|--------------------|
| Bilston CE Primary | | | £31,988.44 | | £31,988.44 |
| St Bartholomew's CE Primary | | | £52,450.43 | | £52,450.43 |
| Lanesfield Primary | | | £11,170.54 | | £11,170.54 |
| Manor Primary | | | £109,920.08 | | £109,920.08 |
| St Mary's Catholic Primary Academy | £5,624.25 | | | £17,883.51 | £23,507.76 |
| Spring Vale Primary | | | £74,507.68 | | £74,507.68 |
| Stowlawn Primary | | | £52,752.24 | | £52,752.24 |
| Loxdale Primary | | | £77,316.55 | | £77,316.55 |
| Elston Hall Primary | £7,540.40 | | | £4,083.83 | £11,624.23 |
| Woden Primary | | £1,920.84 | | | £1,920.84 |
| Whitgreave Primary | £1,089.62 | | | | £1,089.62 |
| Rakegate Primary | £3,092.46 | £8,808.41 | | £2,569.12 | £14,469.99 |
| Oak Meadow Primary | | | | £4,588.83 | £4,588.83 |
| Stowheath Primary | | | | £5,136.52 | £5,136.52 |
| Holy Rosary Catholic Primary | | | | £14,109.08 | £14,109.08 |

| | | | | | |
|--|------------|------------|---------------|------------|----------------------|
| Total Primary | £17,346.73 | £10,729.25 | £410,105.96 | £48,370.89 | £486,552.83 |
| Our Lady & St Chad Catholic Academy | | | £243,690.73 | | £243,690.73 |
| Aldersley High School | | | £175,071.76 | | £175,071.76 |
| Moreton School | £11,530.03 | £10,474.18 | £314,225.42 | £6,284.51 | £342,514.14 |
| Highfields School | | | £138,977.68 | | £138,977.68 |
| St Edmunds Catholic Academy | | | £285,477.66 | | £285,477.66 |
| Wednesfield High Academy | | | £220,634.39 | | £220,634.39 |
| Total Secondary | £11,530.03 | £10,474.18 | £1,378,077.64 | £6,284.51 | £1,406,366.36 |
| GRAND TOTAL | £28,876.76 | £21,203.43 | £1,788,183.60 | £54,655.40 | £1,892,919.19 |
| BUDGETED APPROVED | | | | | £2,000,000.00 |
| DIFFERENCE (UNDERSPEND) 2021-2022 | | | | | £107,080.81 |
| UNDERSPEND FROM 2020-2021 | | | | | £396,237.00 |
| UNDERSPEND TO BE CARRIED FORWARD TO 2022-2023 | | | | | £503,317.81 |

Estimated Growth Fund Allocations 2022-2023 Financial Year

| Establishment | PAID (2022-2023 financial year) | | ESTIMATED | | | |
|------------------------------|---|---|--|---|---|--------------------|
| | Spring 2022 Growth Fund In-year Payment | Summer 2022 Growth Fund In-year Payment | Autumn 2022 Growth fund Standard Payment | Autumn 2022 Growth fund In-year Payment | Spring 2023 Growth Fund In-year Payment | Total |
| Bilston CE Primary | | | | £5,504.38 | £2,359.02 | £7,863.40 |
| Trinity CE Primary Academy | | | | £27,272.17 | £18,280.15 | £45,552.32 |
| St Bartholomew's CE Primary | | | £54,528.82 | | | £54,528.82 |
| Edward the Elder Primary | | | | | £11,947.14 | £11,947.14 |
| Spring Vale Primary | | | £77,343.92 | | | £77,343.92 |
| Stowlawn Primary | | | £57,767.21 | | | £57,767.21 |
| Elston Hall Primary | | £1,763.54 | | | £33,859.96 | £35,623.50 |
| Bantock Primary | | | | | £2,535.42 | £2,535.42 |
| Whitgreave Primary | | | | | £1,194.49 | £1,194.49 |
| Rakegate Primary | | | | £7,964.44 | £1,137.78 | £9,102.22 |
| Oak Meadow Primary | £1,966.64 | | | £4,747.36 | | £6,714.00 |
| Loxdale Primary | | | £80,527.75 | | | £80,527.75 |
| Holy Rosary Catholic Academy | | | | £14,272.25 | | £14,272.25 |
| Hill Avenue Academy | | | £35,852.01 | | | £35,852.01 |
| Total Primary | £1,966.64 | £1,763.54 | £306,019.70 | £59,760.61 | £71,313.96 | £440,824.45 |

| | | | | | | |
|--|-------------------|------------------|----------------------|-------------------|-------------------|----------------------|
| Our Lady & St Chad Catholic Academy | | | £253,976.31 | | | £253,976.31 |
| Aldersley High School | | | £341,141.66 | | | £341,141.66 |
| St Matthias School | | | £37,708.65 | | | £37,708.65 |
| Moreton School | £20,948.36 | | £418,190.60 | | | £439,138.96 |
| Highfields School | | | £154,312.70 | | | £154,312.70 |
| St Edmunds Catholic Academy | | | £284,184.45 | | | £284,184.45 |
| Wednesfield High Academy | | | £263,438.36 | | | £263,438.36 |
| Ormiston SWB Academy | | | £170,644.23 | | | £170,644.23 |
| Colton Hills Community School | | | £184,516.70 | | | £184,516.70 |
| Total Secondary | £20,948.36 | £0.00 | £2,108,113.64 | £0.00 | £0.00 | £2,129,062.00 |
| GRAND TOTAL | £22,915.00 | £1,763.54 | £2,414,133.34 | £59,760.61 | £71,313.96 | £2,569,886.45 |
| APPROVED BUDGET | | | | | | £2,400,000.00 |
| CARRY FORWARD UNDERSPEND FROM 2021-2022 | | | | | | £503,317.81 |
| TOTAL BUDGET | | | | | | £2,903,317.81 |
| ANTICIPATED UNDERSPEND FOR 2022-2023 | | | | | | £333,431.36 |

Estimated 2023–2024 Financial Year: Standard Growth Fund Payments

| Establishment | Additional Places | Estimated Allocation 2023-24 (based on 2022/2023 Funding Formula) |
|--|-------------------|---|
| Stowlawn Primary | 30 | £82,524.58 |
| Spring Vale Primary | 30 | £77,343.92 |
| Loxdale Primary | 30 | £80,527.75 |
| St Bartholomew's CE Primary | 15 | £54,528.82 |
| Hill Avenue Academy | 15 | £67,222.51 |
| Maximum Total Primary | 120 | £362,147.58 |
| St Matthias School | 10 | £37,708.65 |
| Moreton School | 30 | £196,026.84 |
| Highfields School | 28 | £154,312.70 |
| St Edmund's Catholic Academy | 50 | £296,025.47 |
| Wednesfield High Academy | 50 | £306,323.67 |
| Ormiston SWB Academy | 30 | £170,644.23 |
| Colton Hills Community School | 49 | £188,360.79 |
| Maximum Total Secondary | 247 | £1,349,402.35 |
| Contingency | - | £27,881.43 |
| Grand Total | 367 | £1,739,431.36 |
| Minus underspend from 2022-2023 | - | £333,431.36 |
| Budget Required | - | £1,406,000.00 |

Example of Growth Fund email sent to schools

Dear Headteacher

This email is to inform you that your school will shortly be receiving a Growth Fund payment of £7,452.84 with the reference 123456789.

This Growth Fund payment is based on the validated census figures of Autumn term xxxx, for year groups that qualify for growth fund payments as previously agreed with the Local Authority.

A detailed breakdown for this payment is included below, please note that the current cost per additional place filled is £3,726.42.

| Year Group | Number on Roll at Autumn 18 Census | Places Funded | Growth Fund Payment | Payment Type | Additional notes |
|-------------------|---|----------------------|----------------------------|---------------------------|---|
| 3 | 32 | 2 | £7,452.84 | In Year - Tracked Payment | Two remaining places to be filled and funded. |

If you have any questions regarding this Growth Fund Payment please contact school.organisation@wolverhampton.gov.uk.

Kind regards,

This page is intentionally left blank

2021-2022 Financial Year Growth Fund Allocations

| Establishment | Spring 2021 Growth Fund In-year Payment | Summer 2021 Growth Fund In-year Payment | Autumn 2021 Growth fund Standard Payment | Autumn 2021 Growth fund In-year Payment | Total |
|------------------------------------|--|--|---|--|--------------------|
| Bilston CE Primary | | | £31,988.44 | | £31,988.44 |
| St Bartholomew's CE Primary | | | £52,450.43 | | £52,450.43 |
| Lanesfield Primary | | | £11,170.54 | | £11,170.54 |
| Manor Primary | | | £109,920.08 | | £109,920.08 |
| St Mary's Catholic Primary Academy | £5,624.25 | | | £17,883.51 | £23,507.76 |
| Spring Vale Primary | | | £74,507.68 | | £74,507.68 |
| Stowlawn Primary | | | £52,752.24 | | £52,752.24 |
| Loxdale Primary | | | £77,316.55 | | £77,316.55 |
| Elston Hall Primary | £7,540.40 | | | £4,083.83 | £11,624.23 |
| Woden Primary | | £1,920.84 | | | £1,920.84 |
| Whitgreave Primary | £1,089.62 | | | | £1,089.62 |
| Rakegate Primary | £3,092.46 | £8,808.41 | | £2,569.12 | £14,469.99 |
| Oak Meadow Primary | | | | £4,588.83 | £4,588.83 |
| Stowheath Primary | | | | £5,136.52 | £5,136.52 |
| Holy Rosary Catholic Primary | | | | £14,109.08 | £14,109.08 |

| | | | | | |
|--|------------|------------|---------------|------------|----------------------|
| Total Primary | £17,346.73 | £10,729.25 | £410,105.96 | £48,370.89 | £486,552.83 |
| Our Lady & St Chad Catholic Academy | | | £243,690.73 | | £243,690.73 |
| Aldersley High School | | | £175,071.76 | | £175,071.76 |
| Moreton School | £11,530.03 | £10,474.18 | £314,225.42 | £6,284.51 | £342,514.14 |
| Highfields School | | | £138,977.68 | | £138,977.68 |
| St Edmunds Catholic Academy | | | £285,477.66 | | £285,477.66 |
| Wednesfield High Academy | | | £220,634.39 | | £220,634.39 |
| Total Secondary | £11,530.03 | £10,474.18 | £1,378,077.64 | £6,284.51 | £1,406,366.36 |
| GRAND TOTAL | £28,876.76 | £21,203.43 | £1,788,183.60 | £54,655.40 | £1,892,919.19 |
| BUDGETED APPROVED | | | | | £2,000,000.00 |
| DIFFERENCE (UNDERSPEND) 2021-2022 | | | | | £107,080.81 |
| UNDERSPEND FROM 2020-2021 | | | | | £396,237.00 |
| UNDERSPEND TO BE CARRIED FORWARD TO 2022-2023 | | | | | £503,317.81 |

Estimated Growth Fund Allocations 2022-2023 Financial Year

| Establishment | PAID (2022-2023 financial year) | | ESTIMATED | | | Total |
|------------------------------|---|---|--|---|---|--------------------|
| | Spring 2022 Growth Fund In-year Payment | Summer 2022 Growth Fund In-year Payment | Autumn 2022 Growth fund Standard Payment | Autumn 2022 Growth fund In-year Payment | Spring 2023 Growth Fund In-year Payment | |
| Bilston CE Primary | | | | £5,504.38 | £2,359.02 | £7,863.40 |
| Trinity CE Primary Academy | | | | £27,272.17 | £18,280.15 | £45,552.32 |
| St Bartholomew's CE Primary | | | £54,528.82 | | | £54,528.82 |
| Edward the Elder Primary | | | | | £11,947.14 | £11,947.14 |
| Spring Vale Primary | | | £77,343.92 | | | £77,343.92 |
| Stowlawn Primary | | | £57,767.21 | | | £57,767.21 |
| Elston Hall Primary | | £1,763.54 | | | £33,859.96 | £35,623.50 |
| Bantock Primary | | | | | £2,535.42 | £2,535.42 |
| Whitgreave Primary | | | | | £1,194.49 | £1,194.49 |
| Rakegate Primary | | | | £7,964.44 | £1,137.78 | £9,102.22 |
| Oak Meadow Primary | £1,966.64 | | | £4,747.36 | | £6,714.00 |
| Loxdale Primary | | | £80,527.75 | | | £80,527.75 |
| Holy Rosary Catholic Academy | | | | £14,272.25 | | £14,272.25 |
| Hill Avenue Academy | | | £35,852.01 | | | £35,852.01 |
| Total Primary | £1,966.64 | £1,763.54 | £306,019.70 | £59,760.61 | £71,313.96 | £440,824.45 |

| | | | | | | |
|--|-------------------|------------------|----------------------|-------------------|-------------------|----------------------|
| Our Lady & St Chad Catholic Academy | | | £253,976.31 | | | £253,976.31 |
| Aldersley High School | | | £341,141.66 | | | £341,141.66 |
| St Matthias School | | | £37,708.65 | | | £37,708.65 |
| Moreton School | £20,948.36 | | £418,190.60 | | | £439,138.96 |
| Highfields School | | | £154,312.70 | | | £154,312.70 |
| St Edmunds Catholic Academy | | | £284,184.45 | | | £284,184.45 |
| Wednesfield High Academy | | | £263,438.36 | | | £263,438.36 |
| Ormiston SWB Academy | | | £170,644.23 | | | £170,644.23 |
| Colton Hills Community School | | | £184,516.70 | | | £184,516.70 |
| Total Secondary | £20,948.36 | £0.00 | £2,108,113.64 | £0.00 | £0.00 | £2,129,062.00 |
| GRAND TOTAL | £22,915.00 | £1,763.54 | £2,414,133.34 | £59,760.61 | £71,313.96 | £2,569,886.45 |
| APPROVED BUDGET | | | | | | £2,400,000.00 |
| CARRY FORWARD UNDERSPEND FROM 2021-2022 | | | | | | £503,317.81 |
| TOTAL BUDGET | | | | | | £2,903,317.81 |
| ANTICIPATED UNDERSPEND FOR 2022-2023 | | | | | | £333,431.36 |

Estimated 2023–2024 Financial Year: Standard Growth Fund Payments

| Establishment | Additional Places | Estimated Allocation 2023-24 (based on 2022 - 2023 Funding Formula) |
|--|-------------------|---|
| Stowlawn Primary | 30 | £82,524.58 |
| Spring Vale Primary | 30 | £77,343.92 |
| Loxdale Primary | 30 | £80,527.75 |
| St Bartholomew's CE Primary | 15 | £54,528.82 |
| Hill Avenue Academy | 15 | £67,222.51 |
| Maximum Total Primary | 120 | £362,147.58 |
| St Matthias School | 10 | £37,708.65 |
| Moreton School | 30 | £196,026.84 |
| Highfields School | 28 | £154,312.70 |
| St Edmund's Catholic Academy | 50 | £296,025.47 |
| Wednesfield High Academy | 50 | £306,323.67 |
| Ormiston SWB Academy | 30 | £170,644.23 |
| Colton Hills Community School | 49 | £188,360.79 |
| Maximum Total Secondary | 247 | £1,349,402.35 |
| Contingency | - | £27,881.43 |
| Grand Total | 367 | £1,739,431.36 |
| Minus underspend from 2022-2023 | - | £333,431.36 |
| Budget Required | - | £1,406,000.00 |

This page is intentionally left blank

Example of Growth Fund email sent to schools

Dear Headteacher

This email is to inform you that your school will shortly be receiving a Growth Fund payment of £7,452.84 with the reference 123456789.

This Growth Fund payment is based on the validated census figures of Autumn term xxxx, for year groups that qualify for growth fund payments as previously agreed with the Local Authority.

A detailed breakdown for this payment is included below, please note that the current cost per additional place filled is £3,726.42.

| Year Group | Number on Roll at Autumn 18 Census | Places Funded | Growth Fund Payment | Payment Type | Additional notes |
|-------------------|---|----------------------|----------------------------|---------------------------|---|
| 3 | 32 | 2 | £7,452.84 | In Year - Tracked Payment | Two remaining places to be filled and funded. |

If you have any questions regarding this Growth Fund Payment please contact school.organisation@wolverhampton.gov.uk.

Kind regards,

This page is intentionally left blank

Wolverhampton City Council

SCHOOLS' FORUM

Agenda item: 9

| | |
|---------------------------|--|
| Date | 9 October 2014 |
| Report title | Establishment of a Growth Fund to Support Expanding Schools |
| Contact Officer/s | Bill Hague |
| Telephone number/s | 01902 556943 |

Summary

This report outlines the demographic challenges facing the primary school estate and highlights the need to support expanding schools. The report provides additional information relating to the need to establish a Growth Fund and requests that Schools' Forum review their position on this matter.

Decision

Members of the Schools Forum are asked to:

- a) Note the need to ensure that expanding schools are effectively supported in order to receive appropriate revenue support to meet increased pupil numbers
- b) Note that the existing locally adopted approach to supporting pupils in expanding schools is not in line with the Education Funding Agency's recommended approach
- c) Note that the proposed Growth Fund would exclusively support the revenue needs of expanding schools and not be used for any other purpose
- d) Note that any resources remaining in a Growth Fund at the end of the financial year would be reported to Schools' Forum and be added to the following year's Dedicated Schools Grant
- e) Note that the establishment of the Growth Fund would be of benefit to the entire school estate
- f) Agree to the establishment of a Growth Fund to support the needs of pupils in expanding schools.
- g) Agree to monitor the use of the Growth Fund and to receive a periodic update specifying any use of this fund.

Schedule of background papers

- Schools Forum (17 July 2014) 'Supporting School Reorganisations'
- Cabinet (25 June 2014) 'Primary School Organisation'
- Schools Forum (24 October 2013) 'School Funding Reform 2014/15'.

1.0 BACKGROUND

- 1.1 Levels of demand for primary schools in Wolverhampton have increased considerably in recent years. In order to meet demand, the Council has recently invested heavily in the provision of a significant number of additional primary school places in areas of high demand across the City. Recent school expansion schemes have been successful with the vast majority of additional places being occupied.
- 1.2 Levels of demand for primary provision are expected to continue to increase in the short term and projections suggest that additional primary school places urgently need to be introduced in order to ensure the provision of sufficient school places.
- 1.3 Wolverhampton City Council receives Basic Need Funding to support the capital requirement for providing new pupil places. To date the Council has been allocated £7.2 million for the financial years 2015/16 and 2016/17. The estimated cost of delivering sufficient primary school places significantly exceeds this allocation and additional resources are required to ensure that high quality learning environments are provided to meet the needs of pupils. A funding strategy to support the delivery of the 2015 Primary School Expansion Programme has been developed and approved. The additional capital resources will be met from the Council and there will be no call on the Dedicated Schools Grant to fund the capital costs of the expansion programme. The proposed establishment of a Growth Fund will solely support the revenue implications and in no way contributes to the capital requirements of the 2015 Primary School Expansion Programme.
- 1.4 DfE regulations enable Local Authorities, with the agreement of Schools' Forum, to create a growth fund to support the resultant revenue needs of schools which are required to provide extra places in order to meet basic need. Please find the relevant extract from the Education Funding Agency's Operational Guidance at Appendix A.

2.0 2015 PRIMARY SCHOOL EXPANSION PROGRAMME

- 2.1 The 2015 Primary School Expansion Programme proposes the expansion of existing schools across the City in order to meet community needs. Schools currently proposed for inclusion in the 2015 Primary School Expansion Programme are detailed in Appendix B.
- 2.2 Expansion schemes proposed for inclusion in the Programme were developed in line with the Primary School Organisation Strategy 2014 – 2017.
- 2.3 The 2015 Primary School Expansion Programme proposes both permanent expansions and the introduction of bulge classes (time limited expansions of the capacity of individual year groups within schools). The introduction of bulge classes has been considered because of an anticipated peak in demand in the short term. Proposing the introduction of bulge classes, as opposed to proposing the permanent expansion of all schools in the Programme, supports the longer term sustainability of the school estate and offers a more efficient use of resources.
- 2.4 In order to ensure the appropriate investment of resources and the introduction of sufficient primary school places, pupil projections have recently been subject to external challenge and validation. As a consequence, projected demand for Reception places in the 2015/16 academic year has increased.

In order to meet projected demand it is felt necessary to identify an additional expansion scheme, this will increase the number of schools subject to expansion from nine to ten. Council representatives are currently investigating potential opportunities to expand the Programme; however the specific additional scheme is yet to be determined.

3.0 EXISTING APPROACH TO SUPPORT EXPANDING SCHOOLS

- 3.1 It is recognised that taking on additional pupils has revenue budget implications for the schools concerned (as funding is based upon the preceding autumn term School Census). Without the provision of this support, expanding schools would face a shortfall in revenue funding for seven months until the funding allocations reflect actual numbers on roll.
- 3.2 Recent primary school expansion programmes have been supported by Schools' Forum through the in-year allocation of resources to those schools who have been expanded. Schools' Forum have previously determined that the costs of supporting school expansions should be top sliced from the following year's DSG allocation.
- 3.3 Individual school allocations are based upon actual pupil numbers (as at the Autumn Census) and are funded at seven twelfths of the pupil led factors of the local formula. The call on resources in 2014/15 to support previous primary school expansions is £189,189.52.

Figure 1: Allocated Resources in Autumn 2013:

| School | Allocation |
|------------------------|--------------------|
| Bilston CE Primary | £34,116.23 |
| Eastfield Primary | £35,311.75 |
| Northwood Park Primary | £57,915.54 |
| St Andrew's CE Primary | £32,274.20 |
| Wilkinson Primary | £29,571.80 |
| Total | £189,189.52 |

- 3.4 The 2014 Primary School Expansion Programme introduced an additional 90 Reception places into the primary school estate with effect from September 2014. As a consequence the required commitment in 2015/16 is likely to increase. The estimated potential cost to be met in 2015/16 will be in the region of £410,000. Please note that this estimate has simply been produced by multiplying the latest average allocation per pupil by the number of additional school places being provided. Allocations will be made to expanding schools during the autumn term 2014 and in line with Forum's recommended approach resources will be recouped from the 2015/16 DSG allocation.

4.0 THE PROPOSED ESTABLISHMENT OF A GROWTH FUND TO SUPPORT EXPANDING SCHOOLS

- 4.1 The DfE's recommended way of supporting expanding schools is that Local Authorities, "...topslice the DSG in order to create a Growth Fund to support schools which are required to provide extra places in order to meet basic need within the authority, including pre-opening and reorganisation costs" (DFE 2013).
- 4.2 The opportunity to establish a Growth Fund to support expanding schools has proved necessary across the Country; "Some 121 of the 152 authorities are retaining a growth fund in their 2014/15 formulae, with a total value of £142.9m. Growth fund amounts for individual authorities range from £50,000 to £6m" (Education Funding Agency: March

2014). For examples of established growth funds and the employed growth criteria, please see Annex 4 in Appendix A.

- 4.3 Growth funds can only be used to support growth in pre-16 pupil numbers to meet basic need, support additional classes needed to meet infant class size regulation and to meet the costs of new schools. These include the lead-in costs e.g. to fund the appointment of staff and purchase of any goods or services necessary in order to admit pupils.
- 4.4 Please note that a Growth Fund would not be used to support schools in financial difficulty or to support general growth due to popularity.
- 4.5 Any funds remaining at the end of the financial year would be reported to Schools' Forum and would be added to the following year's DSG.
- 4.6 Any Growth Fund must be employed on the same basis for the benefit of both maintained schools and academies.
- 4.7 There is a requirement that Local Authorities (LAs) produce criteria on which any Growth Fund would be allocated, set out the circumstances in which payment could be made and provide a basis for calculating the sum to be paid. Criteria should provide a transparent and consistent basis for the allocation of funding. LAs need to gain agreement from Schools' Forum prior to implementation and also must ensure that Forum are regularly updated on the use of funding.
- 4.8 In line with the Education Funding Agency's (EFA) recommended approach and given the size of the anticipated call on resources to support school expansions, the establishment of a Growth Fund is recommended. This would enable income to be matched to the period in which the expenditure occurred and ensure that expanding schools continue to be supported.
- 4.9 It is proposed that schools would qualify for funding through the Growth Fund in the following circumstances:
 - The school or academy has agreed with the LA to permanently increase its admission limit to meet basic need
 - The school or academy has agreed with the LA to provide a bulge class to meet basic need.
- 4.10 The principal basis for allocating additional funding would be the number of additional children admitted (as at October School Census). Individual schools' funding rates would be based upon the pupil led factors of the funding formula.

However, in order to offer expanding schools more security, it is proposed that a guaranteed minimum level of funding is introduced. Expanding schools would be guaranteed to receive at a minimum, the equivalent of the salary of a teacher at the mid-point of the teachers' main scale for each 30 additional places provided (this figure would be adjusted on a pro-rata basis depending on the number of additional places being provided).

- 4.11 Due to the variations in financial years it is proposed that allocations to maintained schools would reflect the period September to March, whilst allocations to academies would reflect the period September to August. It is understood that the EFA would adjust the relevant recoupment to reflect the extra cost to the Authority to cover the period April to August.

- 4.12 Should a Growth Fund be established, it is estimated that it would be necessary to retain in the region of £1.2M in the 2015/16 Financial Year. Please note that this estimate is based upon multiplying the latest average allocation per pupil by the number of additional school places, with an estimate applied for the potential number of relevant academy conversions (please see Appendix C which details the school expansion schemes that this fund could potentially support in 2015/16).

Please note that the City would attract additional DSG funding in the subsequent funding year as a result of the increased number of pupils in the system (we currently receive £4,286 per pupil).

- 4.13 In order to ensure transparency it is proposed that the use of any Growth Fund would be reported to Schools' Forum on a periodic basis as part of standard reports detailing the use of the DSG.

5.0 SUPPORTING EXPANDING SCHOOLS

- 5.1 Schools proposed for expansion have raised significant concerns regarding Schools' Forum's decision in July 2014 not to establish a Growth Fund. Schools have emphasised the importance of ensuring that an appropriate revenue stream is available in a timely manner to support the needs of pupils.
- 5.2 The expansion of a school carries with it the inherent risk of a drop in standards. It should be recognised that the added pressure of an expansion scheme on Headteachers, members of staff and Governing Bodies can leave schools vulnerable and susceptible to a decline in performance. If resources are not made available to support the needs of the additional pupils in a timely manner, the risk of a reduction in the quality of education provided is exacerbated.
- 5.3 By supporting school expansions and meeting the needs of pupils and communities in a planned manner, expanding schools not only assist individual families and children but benefit the entire school estate. Primary schools are currently experiencing significant pressure on pupil places across Key Stage 1; this has resulted in increased class sizes, an increased number of classes exceeding the recommended infant class size and the allocation of pupils to schools a significant distance from their homes. Without the implementation of each of the proposed expansion schemes in the 2015 Primary School Expansion Programme these issues are likely to increase.
- 5.4 Wolverhampton will run out of school places if the 2015 Primary School Expansion Programme is not implemented. If this eventuality occurs, the Local Authority will have no option but to urgently place additional pupils into existing establishments in accordance with the Admissions Code and national guidelines. Schools would be required to cater for cohorts who significantly exceed existing admission limits and it is highly likely that pupils would be accommodated in temporary accommodation. This may impact detrimentally on pupil performance and the overall quality of education available in the City.
- 5.5 Any reduction in the performance of the primary school estate will in due course impact upon secondary provision in the City.

6.0 IMPLICATIONS OF NOT ESTABLISHING A GROWTH FUND

- 6.1 In the event of a decision not to establish a Growth Fund:

- a) Expanding schools will need to draw on their revenue reserves until the next planned DSG allocation
- b) In accordance with the Education Funding Agency's 'Schools Forum Operational and Good Practice Guide' (October 2013), the Council will consider seeking an adjudication on this matter from the Secretary of State.

7.0 IMPACT

7.1 The allocation of resources from the DSG impacts on the funds directed to schools and impacts directly on all areas of the Learning and Achievement Service.

financial ✓ **governance** ✓ **educational** ✓ **other directorates** ✓

Schools Revenue Funding 2015 to 2016: Operational Guide: Relevant Extracts**“Centrally Retained Services**

59. The requirements of the falling rolls fund and the growth fund are that:

- the growth fund can be used only for the purposes of supporting growth in pre-16 pupil numbers to meet basic need, to support additional classes needed to meet the infant class size regulation and to meet the costs of new schools. These will include the lead-in costs e.g. to fund the appointment of staff and the purchase of any goods or services necessary in order to admit pupils. It will also include post start-up costs and any diseconomy of scale costs. These pre and post start-up costs should be provided for academies where they are created to meet basic need. (EFA will continue to fund start-up and diseconomy costs for new free schools).
- both funds must be used on the same basis for the benefit of both maintained schools and academies. Where EFA funds academies based on estimates, it is unlikely that the academy will need to access the growth fund.
- any funds remaining at the end of the financial year must be added to the following year’s DSG but may be earmarked for the same purpose.
- local authorities will be required to produce criteria on which any falling rolls fund or growth funding is to be allocated. These should provide a transparent and consistent basis for the allocation of funding. Differences in allocation methodology are permitted between phases. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid. EFA will check the criteria for compliance with the regulations.
- local authorities should propose the criteria for both funds to the schools forum and gain its agreement before funding is allocated. The local authority will also need to consult the schools forum on the total sum to be top-sliced from each phase and should regularly update the schools forum on the use of the funding.”

“Annex 4: Growth Criteria

Local authorities may topslice the DSG in order to create a Growth Fund to support schools which are required to provide extra places in order to meet basic need within the authority, including pre-opening and reorganisation costs. The growth fund may not be used to support schools in financial difficulty (any such support for maintained schools would be provided from a de-delegated contingency) or general growth due to popularity. Criteria for allocating growth funds should contain clear objective trigger points for qualification and a clear formula for calculating allocations. Compliant criteria would generally contain some of the features set out below:

- Support where a school or academy has agreed with the 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)
- Additional support where a school has extended its age range (the majority of funding would be paid through the funding formula where the local authority should seek a variation in pupil numbers)

- Support where a school has temporarily increased its PAN by X or more pupils in agreement with the authority.
- Support for KS1 classes where overall pupil numbers exceed a multiple of 30 by X or fewer pupils.
- Pre-opening costs / initial equipping allowance for new maintained schools and recoupment academies, including new academies where the school is opening in response to basic need.

Local authorities should request a variation to pupil numbers where there is a more permanent and significant change to numbers and where it is appropriate for the change to be reflected in all relevant formula factors and not just a marginal cost or AWPU only allocation.

Methodologies for distributing funding could include:

- A lump sum payment with clear parameters for calculation (usually based upon the estimated cost of making additional provision for a new class or the estimated start-up costs.
- £x per pupil (usually based on AWPU) and reflecting the proportion of the year which is not funded within the school's budget share.
- £x per pupil, with a maximum ceiling

Where growth funding is payable to academies, the local authority is required to fund the increase for the period from the additional September intake through until the following August. Local authorities should enter the cost of growth funding for the April – August period on the recoupment tab of the APT so that the recoupment calculation can be adjusted accordingly.

Where schools have agreed an expansion in pupil numbers with the local authority, they should ensure that they understand the methodology for funding the increase and are content that the expansion is deliverable within the funding available.

Some examples of local authorities' compliant criteria are shown below (these do not mean we are endorsing the amounts used):

Ealing primary schools

£60,000 per additional FE (pro-rata for 0.5 FE) for Reception increases agreed by the LA for the September intake (for infant and primary schools) and Year 3 (Junior Schools);

Where building works are required and agreed by the LA costing in excess of £2m, £15,000 a year for two financial years, the timing of the release of funding will be following the approval of statutory proposals or the increase in the school's planned admission number where statutory proposals are not required. Funding may be released earlier at the discretion of the LA.

Ealing high schools

£75,000 per FE for planned expansion in places agreed by the LA.

Where building works are required and agreed by the LA costing in excess of £2m, £15,000 a year for two financial years, the timing of the release of funding is following the approval of statutory proposals or the increase in the school's planned admission number where statutory proposals are not required. Funding may be released earlier at the discretion of the LA.

In both sectors, in exceptional cases, for example where additional furniture, learning resources or support staff costs are required which cannot be charged to capital, a case may be made to the LA for additional revenue funding up to a maximum of £15,000 one-off payment.

Solihull

Qualification for funding through the pupil growth scheme is based upon a set of principles as follows:-

Additional funding will be made available to schools and academies in circumstances where:

- The Council carries out a formal consultation and approves to increase the capacity of a school.
- A school/academy carries out a formal consultation at either the request of the Council or supported by the Council.
- The Council requests a school/academy to increase their PAN to meet localised demand.
- A school/academy admits a significant increase in pupils to meet demand from new housing developments at the request of the Council.

Additional funding will be made in relation to the number of additional pupils taken or the number of agreed places purchased. Reference may be made to the number of classes required and may include consideration of the number of pupils leaving the school in that year.

Any allocation will be based on the teacher element of the AWPU, and will reflect the period September to March only (as additional funding will then flow through the October pupil count) for maintained schools and September to August for academy schools (as additional funding does not flow through until the start of the next academic year). Additional funding may be made available for pupil resources where the provision is a significant expansion of provision, particularly where a new key stage is being provided.

No allocation will be made to a school/academy where the school/academy:

- Has surplus places and then takes additional children up to the PAN
- Admits over PAN at their own choice.
- Admits extra pupils where those pupils have a reasonable alternative school place.
- Is directed and/or requested to admit additional pupils as a result of errors, appeals, fair access protocol, SEN, LAC etc. as these numbers will be extremely low on an individual school basis.

- Provides an additional infant class to meet class size legislation

Staffordshire

Growth funding would be provided to a primary school where:

- the County Council agree that exceeding PAN (temporarily) or increasing the PAN (permanently) is necessary to meet population growth (not simply popularity growth or one school's desire to increase capacity);
- the County Council agree that the creation of an additional class is necessary and is directly related to exceeding PAN;
- the class is additional if it requires a change in the school's current or historical class organisation or number of classes;
- Schools that have historically operated mixed age classes or have a PAN in a multiple of 15 would be normally expected to operate some mixed-age classes. (The growth funding cannot be used only to reduce class sizes).
- A school's compulsory school-age range is increased the additional classes created would be funded. (e.g. when an infant school is converted into a primary school, it would be funded for each additional junior class created).

Funding would be provided only for the first academic year that an additional class is created.

Where one additional class was needed in an area but agreement cannot be reached to fund one school, the funding allocation may be split between two or more schools.

Assuming that the additional class is created in September, the primary school would receive funding equivalent to:

- 7/12ths salary cost of a 1 FTE teacher (Main Scale 6)
- 7/12ths salary cost of a 0.5 FTE teaching assistant (Grade 4)
- £3,000 towards the cost of resources and materials
- If the class is created between September and April, the amount would be reduced by a 1/7th for each whole month that the class is not needed.

Schools must comply with the infant class size legislation (and any school funded would not also receive separate infant class size funding).

Start-up funding for new schools:

Where a new school or academy is established in response to basic need for pupil places, funding will be made available in recognition of costs incurred before the school opens. A one-off payment of £50,000 will be made for a two form entry (or larger) primary school, or £25,000 for smaller than two-form entry schools.

Funding is also available to support diseconomies of scale when a school or academy opens without a full complement of year groups. Payments will be made over two years

in accordance with the table shown below, with 50% paid in the year of opening and the remaining 50% the following year.

- Academy is more than 90% full £0
- Gradual build-up of pupils after Academy starts off 80-90% full £10k
- Gradual build-up of pupils after Academy starts off 70-80% full £35k
- Gradual build-up of pupils after Academy starts off 60-70% full £60k
- Gradual build-up of pupils after Academy starts off 50-60% full £85k
- Gradual build-up of pupils after Academy starts off 40-50% full £105k
- Gradual build-up of pupils after Academy starts off 30-40% full £135k

Worcestershire

Additional funding will be made available in circumstances where:

- The LA carries out a formal consultation and approves to increase the capacity of a school.
- The LA requests schools to increase their PAN and the school has the capacity.
- The LA requests schools to admit significant additional pupils as a consequence of a school closure.

Additional funding will be made in relation to the number of additional pupils taken.

Funding will be given on a 7/12 basis to cover September to March each year. (The period April to August will be covered by the schools budget based on numbers from the October census).

Any allocation will be based upon the AWPU and will be relevant to the key stage.

No allocation will be made to a school that has not been the subject of a consultation where a school:

- Has surplus places and then takes additional children up to the PAN.
- Admits over PAN at their own choice.
- Is directed and/or requested to admit additional pupils as result of errors, appeals, fair access panel, SEN, LAC, etc. as these numbers will be extremely low on an individual school basis.

Funding will be allocated on the increase in actual numbers on the difference in pupils leaving and joining. For example in a primary school between the numbers leaving Year 6 and numbers entering Reception for 7 years from date of increased capacity.”

2015 Primary School Expansion Programme

| School | Ward | Proposed Scheme |
|------------------------|----------------------|---------------------|
| Bilston CE Primary | Ettingshall | Permanent Expansion |
| Bushbury Hill Primary | Fallings Park | 2 Year Bulge |
| Eastfield Primary | East Park | Permanent Expansion |
| Loxdale Primary | Bilston East | 2 Year Bulge |
| Manor Primary | Spring Vale | Permanent Expansion |
| St Martin's CE Primary | Bilston East | 2 Year Bulge |
| Stowlawn Primary | Bilston North | 1 Year Bulge |
| Westacre Infant | Tettenhall Wightwick | Permanent Expansion |
| West Park Primary | Park | 2 Year Bulge |

Potential Recipients (2015/16)

| School | Ward | Scheme | Expansion Programme | Estimated Allocations (all places filled) |
|-----------------------------|----------------------|------------------------------|---------------------|--|
| Bilston CE Primary | Ettingshall | Permanent Expansion to 1.5fe | 2012 | £34,190.85 |
| Eastfield Primary | East Park | Permanent Expansion to 1.5fe | 2012 | £34,190.85 |
| St Andrew's CE Primary | Park | Permanent Expansion | 2012 | £34,190.85 |
| Wilkinson Primary | Bilston East | Permanent Expansion | 2012 | £34,190.85 |
| Northwood Park Primary* | Bushbury North | Permanent Expansion | 2013 | £117,225.90 |
| Dunstall Hill Primary | St Peter's | Permanent Expansion | 2014 | £68,381.70 |
| Fallings Park Primary | Fallings Park | Permanent Expansion | 2014 | £68,381.70 |
| Trinity CE Primary | Heath Town | Permanent Expansion | 2014 | £68,381.70 |
| Bilston CE Primary | Ettingshall | Permanent Expansion to 2fe | 2015 | £34,190.85 |
| Bushbury Hill Primary | Fallings Park | 2 Year Bulge | 2015 | £68,381.70 |
| Eastfield Primary | East Park | Permanent Expansion to 2fe | 2015 | £34,190.85 |
| Loxdale Primary | Bilston East | 2 Year Bulge | 2015 | £68,381.70 |
| Manor Primary* | Spring Vale | Permanent Expansion | 2015 | £117,225.90 |
| St Martin's CE Primary* | Bilston East | 2 Year Bulge | 2015 | £117,225.90 |
| Stowlawn Primary | Bilston North | 1 Year Bulge | 2015 | £68,381.70 |
| West Park Primary | Park | 2 Year Bulge | 2015 | £68,381.70 |
| Westacre Infants | Tettenhall Wightwick | Permanent Expansion | 2015 | £34,190.85 |
| Scheme yet to be determined | TBC | TBC | 2015 | £68,381.70 |

Please note that:

- Schools highlighted with a star have applied to convert to academy status and applications have been approved. Due to the variations in financial years it is proposed that allocations to maintained schools would reflect the period September to March, whilst allocations to academies would reflect the period September to August.
- Greyed schools have been expanded as part of previous expansion programmes and have received previous support in line with Schools' Forums existing approach to support school expansions.
- Estimated allocations have simply been produced by multiplying the latest average allocation per pupil by the number of additional school places being provided.

City of Wolverhampton Council

SCHOOLS' FORUM

| | |
|------------------------|--|
| Date | 1 December 2022 |
| Report title | 2023-2024 National Funding Formula Provisional Allocations and Update on Budget Setting |
| Contact Officer | James Barlow, Finance Business Partner |
| Contact | James.barlow@wolverhampton.gov.uk |

Summary

In July 2022, the Department for Education (DfE) published the National Funding Formula (NFF) Provisional Allocations for the Schools Block, the High Needs Block and the Central Schools and Services Block for the 2023-2024 Dedicated Schools Grant (DSG).

The purpose of this report is to notify Schools' Forum Members of the indicative allocations and the process for setting budgets funded by the DSG in 2023-2024.

It should be noted that initial modelling on the Schools Block of DSG indicates that it may not be affordable to fully utilise NFF factors without reducing the Minimum Funding Guarantee or introducing a cap on gains. The figures shown in Appendix 2 are indicative of what schools would receive if funding is sufficient and may be subject to change. Further consultation will be undertaken on potential solutions to this issue in January 2023 if required.

The Early Years Block Provisional Allocation is expected to be published by the Department for Education in December 2022, and a report will be received by Forum in February detailing the proposed budget for approval.

Decision

Members of Schools' Forum are asked to:

1. Note the indicative allocations and the process for setting budgets funded by the DSG in 2023-2024.

1.0 Schools Block Allocation 2023-2024

Background and Indicative Allocations 2023-2024

- 1.1 For the financial year 2023-2024 it will remain the duty of Local Authorities to set a local funding formula, in consultation with their Schools' Forum, to determine the allocation of funding from the Schools Block of the DSG to schools in the City. Central government has recently restated its intention to move to a direct National Funding formula (NFF) by 2027-2028 at the latest.
- 1.2 In order to move towards a direct NFF, a requirement has been introduced for 2023-2024 that Local Authorities should move their local funding formula factors 10% closer to the factors used in the NFF. At the January 2020 meeting of Schools' Forum, members voted to fully adopt all factors of the NFF and this has continued in subsequent years, so no further movement towards these factors is required.
- 1.3 The Schools Block NFF allocation for 2022-2023 was £236.0 million which included an allocation of £2.0 million for growth funding. In addition to this, there was an additional allocation to schools in 2022-2023 of £7.2 million via the Schools supplementary grant. The Council has been notified of an **indicative** Schools Block National Funding Formula allocation of £247.7 million for 2023-2024 and at this stage the allocation does not include an element for growth funding. This allocation is based on pupil numbers from the October 2021 census. The actual DSG allocation for 2023-2024 is expected to be published in the third week in December 2022 in line with previous years. This will be based on October 2022 census data and will include an additional element for growth funding.
- 1.4 This results in an indicative increase on the original 2022-2023 allocation of around 5.2%, and an increase of around 2.7% when the supplementary grant is factored in.
- 1.5 The updated NFF factors are shown in Appendix 1, and the overall increase to these factors is an average of 5%.
- 1.6 It should be noted that the allowable Minimum Funding guarantee (MFG) for 2023-2024 must be between 0% and 0.5%, in comparison to the allowable 0.5% to 2.0% in 2022-2023. The MFG is a measure used to regulate the annual change for schools by looking at per pupil factor funding and discounting school level funding elements such as the lump sum and rates. This means that for schools where their current funding per pupil is above the NFF, and implementation would therefore result in a reduction in budget from one year to the next, there is a limit to the amount this element of the budget can reduce between years.

Affordability of the NFF in 2023-2024

- 1.7 The Schools Block element of the DSG is made up of school funding which must be paid directly to schools, and an element for the growth fund, with the split to be determined locally. Whilst the Authority has been able to fully implement the NFF for schools since 2020, this has been affordable by using an element of the funding the government had allocated for growth. For example, in 2022-2023 there was a government allocation for growth of £2.0 million, however only £456,600 was used for this purpose and the remainder was used to 'top-up' the overall allocation to allow full NFF implementation. This was possible as in previous years growth fund underspends had built up, allowing the 2022-2023 growth fund budget to be set at £2.4 million. However, the current forecast is that there will only be £125,000 growth fund carried forward to 2023-2024,

meaning that until the growth fund allocation is announced in December, it is unclear if the utilisation of any excess funding will be possible in 2023-2024.

- 1.8 The government provides a modelling tool for Local Authorities to model the impact of potential local funding formulas. The tool has been populated with NFF numbers for 2023-2024 and the total funding required would be £248.5 million, this is £836,000 or 0.34% greater than the indicative allocation of £247.7 detailed above in 1.3. These allocations are shown in Appendix 2, however it must be noted these are indicative and affordability cannot be confirmed until the final allocation is known.
- 1.9 If there is a requirement to consult following the official DSG Allocation in December, then it would be the intention of the Authority to consult with all schools in early January 2023 via an email survey and present the results and options to Schools' Forum at the January 2023 meeting. This will involve either reducing the MFG for schools or introducing a cap on individual schools gains to make the overall formula affordable. If required, these measures will be detailed in the consultation with examples of the implications for each option. Schools' Forum will be asked to recommend the funding formula to Cabinet at the January meeting, and the final budgets will be published and presented to Schools' Forum at the February 2023 meeting.
- 1.10 In 2023-2024 the government announced, further to a consultation, that it would be ending the Schools improvement grant in 2023-2024, after reducing it by 50% in 2022-2023. Schools' Forum agreed an uplift to the Education function factor to make up this difference in 2022-2023, and the proposals for 2023-2024 will be detailed in the January Schools' Forum papers. This will also be part of the consultation with all schools in January 2023.
- 1.11 It should be noted that there are currently two government options for schools NNDR, schools can either be allocated budgets and pay invoices to Councils **or** this funding can be maintained at government level and allocated directly to Local Authorities. At this stage the Council is proposing to continue with current arrangements, i.e., schools are allocated funding and invoiced for 2023-2024 and schools will be advised when the situation is subject to change.

2.0 High Needs Block Provisional Allocation

- 2.1 The total High Needs Block provisional settlement for the City of Wolverhampton Council for 2023-2024 published in July 2022 is £55.5 million, which is a provisional increase of 5% when comparing to the allocation for 2022-2023. Work will continue to determine a 2023-2024 High Needs Block budget, in conjunction with the School's Forum High Needs Sub-Group, and the final budget will be presented to Forum for approval at the February meeting.

3.0 Central School Services Block Allocation

- 3.1 The Central School Services Block provisional settlement for the City of Wolverhampton Council for 2023-2024 published in July 2022 is £2.0 million, with indications that there will be a reduction in the region of £40,000. A report will be presented to School's Forum at the February meeting with a proposed CSSB budget to agree.

4.0 Growth Fund

- 4.1 The required budget for growth funding in 2023-2024 has been estimated to be £1.7 million. The Council will be notified of the DSG allocation in December 2022 and this will be discussed with Schools' Forum at the January 2023 meeting.

This page is intentionally left blank

City of Wolverhampton National Funding Formula factors for 2023-2024

| Funding Factor | | | National Funding Formula 2022-2023 | CWC recommended rates 2022-2023 (with Area Cost Adjustments) | National Funding Formula 2023-2024 | CWC recommended rates 2023-2024 (with Area Cost Adjustments) | Increase in factor % |
|---|--------------------------------|----------------------|------------------------------------|--|------------------------------------|--|----------------------|
| Basic entitlement | Age-Weighted Pupil Unit (AWPU) | Primary | 3,217.00 | 3,227.87 | 3,394.00 | 3,405.47 | 5.5% |
| | | Secondary: KS3 | 4,536.00 | 4,551.33 | 4,785.00 | 4,801.17 | 5.5% |
| | | Secondary: KS4 | 5,112.00 | 5,129.28 | 5,393.00 | 5,411.23 | 5.5% |
| Needs Led Factors | | | | | | | |
| Deprivation Through a combination of FSM and IDACI Bands | Free School Meals | Primary FSM | 470.00 | 471.59 | 480.00 | 481.62 | 2.1% |
| | | Secondary FSM | 470.00 | 471.59 | 480.00 | 481.62 | 2.1% |
| | | Ever6 FSM: Primary | 590.00 | 591.99 | 705.00 | 707.38 | 19.5% |
| | | Ever6 FSM: Secondary | 865.00 | 867.92 | 1,030.00 | 1,033.48 | 19.1% |
| | IDACI Band F | Primary | 220.00 | 220.74 | 230.00 | 230.78 | 4.5% |
| | | Secondary | 320.00 | 321.08 | 335.00 | 336.13 | 4.7% |
| | IDACI Band E | Primary | 270.00 | 270.91 | 280.00 | 280.95 | 3.7% |
| | | Secondary | 425.00 | 426.44 | 445.00 | 446.50 | 4.7% |
| | IDACI Band D | Primary | 420.00 | 421.42 | 440.00 | 441.49 | 4.8% |
| | | Secondary | 595.00 | 597.01 | 620.00 | 622.10 | 4.2% |
| | IDACI Band C | Primary | 460.00 | 461.55 | 480.00 | 481.62 | 4.3% |
| | | Secondary | 650.00 | 652.20 | 680.00 | 682.30 | 4.6% |
| | IDACI Band B | Primary | 490.00 | 491.66 | 510.00 | 511.72 | 4.1% |
| | | Secondary | 700.00 | 702.37 | 730.00 | 732.47 | 4.3% |
| | IDACI Band A | Primary | 640.00 | 642.16 | 670.00 | 672.26 | 4.7% |
| Secondary | | 890.00 | 893.01 | 930.00 | 933.14 | 4.5% | |

| Funding Factor | | | National Funding Formula 2022-2023 | City of Wolverhampton recommended rates 2022-2023 (with Area Cost Adjustments) | National Funding Formula 2023-2024 | City of Wolverhampton recommended rates 2023-2024 (with Area Cost Adjustments) | City of Wolverhampton recommended rates 2023-2024 (with Area Cost Adjustments) |
|--|--|-----------|------------------------------------|--|------------------------------------|--|--|
| Low Prior Attainment | | Primary | 1,130.00 | 1,133.82 | 1,155.00 | 1,158.90 | 2.2% |
| | | Secondary | 1,710.00 | 1,715.78 | 1,750.00 | 1,755.92 | 2.3% |
| English As an Additional Language (EAL) | Pupils with a first language other than English attract funding for up to 3 years | Primary | 565.00 | 566.91 | 580.00 | 581.96 | 2.7% |
| | | Secondary | 1,530.00 | 1,535.17 | 1,565.00 | 1,570.29 | 2.3% |
| Pupil Mobility | Counts pupils entering a school during the last 3 academic years but did not start in August or September) | Primary | 925.00 | 928.13 | 945.00 | 948.19 | 2.2% |
| | | Secondary | 1,330.00 | 1,334.50 | 1,360.00 | 1,364.60 | 2.3% |
| School/ Premises Led Factors | | | | | | | |
| Sparsity | Schools located in areas where pupils have to travel; or small schools | Primary | N/a | | | | |
| | | Secondary | N/a | | | | |
| Lump Sum | | Primary | 121,300.00 | 121,709.99 | 128,000.00 | 128,432.64 | 5.5% |
| | | Secondary | 121,300.00 | 121,709.99 | 128,000.00 | 128,432.64 | 5.5% |

Indicative Funding per School 2023-2024 and comparison with allocations for 2023-2024

| School Name | 22-23 MFG NOR | 22-23 Post MFG Budget | 23-24 Post MFG Budget with FULL NFF MAY NOT BE AFFORDABLE | Post MFG Budget Change |
|------------------------------|---------------|-----------------------|---|------------------------|
| Total cost | | | 248,519,667.47 | |
| Bushbury Hill Primary School | 282 | 1,536,195.51 | 1,606,354.35 | 4.6% |
| Fallings Park Primary School | 625 | 3,145,668.84 | 3,329,399.24 | 5.8% |
| Whitgreave Primary School | 415 | 2,203,830.46 | 2,278,921.73 | 3.4% |
| Graiseley Primary School | 204 | 1,125,485.88 | 1,185,056.13 | 5.3% |
| Springdale Primary School | 418 | 1,923,462.27 | 2,030,940.22 | 5.6% |
| Rakegate Primary School | 404 | 2,020,561.81 | 2,133,057.45 | 5.6% |
| Claregate Primary School | 376 | 1,709,707.67 | 1,803,763.31 | 5.5% |
| Castlecroft Primary School | 216 | 993,579.86 | 1,049,423.54 | 5.6% |
| Westacre Infant School | 271 | 1,213,853.50 | 1,279,404.63 | 5.4% |
| Loxdale Primary School | 391 | 1,942,864.25 | 2,054,135.76 | 5.7% |
| Stowlawn Primary School | 323 | 1,686,300.09 | 1,781,656.06 | 5.7% |
| Long Knowle Primary School | 210 | 1,076,379.31 | 1,138,095.19 | 5.7% |
| Wood End Primary School | 206 | 1,038,321.24 | 1,095,634.83 | 5.5% |
| Stow Heath Primary School | 418 | 2,089,270.82 | 2,206,751.37 | 5.6% |
| Wilkinson Primary School | 417 | 2,036,512.72 | 2,150,355.18 | 5.6% |
| Lanesfield Primary School | 296 | 1,468,229.00 | 1,549,608.30 | 5.5% |
| Spring Vale Primary School | 328 | 1,587,644.41 | 1,676,852.29 | 5.6% |
| Uplands Junior School | 379 | 1,648,428.80 | 1,738,533.31 | 5.5% |
| Merridale Primary School | 203 | 1,070,111.79 | 1,119,269.59 | 4.6% |
| Oak Meadow Primary School | 420 | 1,880,156.72 | 1,986,670.76 | 5.7% |

| | | | | |
|---|-----|--------------|--------------|------|
| Eastfield Primary School | 399 | 2,103,498.48 | 2,176,230.18 | 3.5% |
| Warstones Primary School | 414 | 1,923,001.04 | 2,031,939.28 | 5.7% |
| Wodensfield Primary School | 419 | 2,017,181.44 | 2,128,403.30 | 5.5% |
| Dovecotes Primary School | 242 | 1,307,869.99 | 1,382,429.02 | 5.7% |
| West Park Primary School | 281 | 1,499,485.22 | 1,585,038.59 | 5.7% |
| Bantock Primary School | 375 | 2,049,517.11 | 2,162,684.81 | 5.5% |
| St Andrew's Church of England Primary School | 403 | 2,082,288.11 | 2,197,709.70 | 5.5% |
| Christ Church (Church of England) Infant and Nursery School | 166 | 768,376.24 | 809,368.53 | 5.3% |
| Christ Church (Church of England) Junior School | 221 | 997,661.92 | 1,052,382.29 | 5.5% |
| Bilston Church of England Primary School | 434 | 2,206,902.76 | 2,332,902.07 | 5.7% |
| St Luke's Church of England Aided Primary School | 421 | 2,047,042.97 | 2,159,112.14 | 5.5% |
| Holy Trinity Catholic Primary School | 230 | 1,158,983.80 | 1,223,916.41 | 5.6% |
| St Paul's Church of England Aided Primary School | 215 | 1,048,101.10 | 1,107,170.70 | 5.6% |
| St Michael's Church of England Aided Primary School | 201 | 947,853.50 | 1,002,329.46 | 5.7% |
| St Matthias School | 857 | 6,676,369.61 | 6,898,259.83 | 3.3% |
| Colton Hills Community School | 881 | 6,235,246.95 | 6,593,104.97 | 5.7% |
| The King's Church of England School | 539 | 3,794,067.17 | 4,016,767.40 | 5.9% |
| Woden Primary School | 423 | 2,204,066.35 | 2,283,098.92 | 3.6% |
| Nishkam Primary School Wolverhampton | 415 | 1,992,256.71 | 2,102,477.58 | 5.5% |
| SS. Mary and John's Catholic Primary Academy | 203 | 1,096,526.10 | 1,158,704.31 | 5.7% |
| St Jude's Church of England Primary Academy | 405 | 1,914,298.55 | 2,024,112.97 | 5.7% |
| Berrybrook Primary School | 207 | 1,124,279.36 | 1,190,252.33 | 5.9% |
| Dunstall Hill Primary School | 438 | 2,268,795.27 | 2,392,898.45 | 5.5% |
| Grove Primary Academy | 404 | 2,118,071.11 | 2,237,382.73 | 5.6% |
| Palmers Cross Primary School | 210 | 1,034,546.76 | 1,093,531.17 | 5.7% |
| Bushbury Lane Academy | 188 | 1,075,304.86 | 1,136,959.41 | 5.7% |
| Hill Avenue Academy | 312 | 1,544,054.24 | 1,628,941.76 | 5.5% |

| | | | | |
|--|-----|--------------|--------------|------|
| East Park Academy | 615 | 2,962,722.04 | 3,134,072.94 | 5.8% |
| Field View Primary School | 409 | 2,128,931.74 | 2,252,577.50 | 5.8% |
| Villiers Primary School | 613 | 2,835,183.62 | 2,992,348.80 | 5.5% |
| St Alban's Church of England Primary Academy | 174 | 907,971.34 | 951,802.44 | 4.8% |
| Deyncourt Primary School | 314 | 1,397,810.14 | 1,475,712.03 | 5.6% |
| Woodfield Primary School | 554 | 2,398,512.31 | 2,532,572.07 | 5.6% |
| Manor Primary School | 621 | 2,654,997.00 | 2,802,259.24 | 5.5% |
| Parkfield Primary School | 208 | 1,097,301.14 | 1,160,754.38 | 5.8% |
| Goldthorn Park Primary School | 376 | 1,806,242.51 | 1,907,506.13 | 5.6% |
| St Patrick's Catholic Primary Academy | 206 | 1,075,681.78 | 1,135,297.73 | 5.5% |
| Perry Hall Primary School | 411 | 1,816,563.07 | 1,919,755.03 | 5.7% |
| Elston Hall Primary School | 628 | 2,789,339.06 | 2,948,334.26 | 5.7% |
| Woodthorne Primary School | 388 | 1,659,798.67 | 1,716,465.62 | 3.4% |
| St Bartholomew's Church of England Primary School | 356 | 1,523,356.96 | 1,573,196.96 | 3.3% |
| St Stephen's Church of England Primary School | 208 | 1,128,458.21 | 1,193,365.94 | 5.8% |
| St Thomas' Church of England Primary Academy | 206 | 977,085.31 | 1,032,502.27 | 5.7% |
| St Martin's Church of England Primary School | 265 | 1,348,933.01 | 1,427,871.51 | 5.9% |
| Trinity CofE Primary Academy | 610 | 3,000,508.00 | 3,171,810.34 | 5.7% |
| Holy Rosary Catholic Primary Academy | 194 | 1,050,909.98 | 1,107,961.28 | 5.4% |
| St Anthony's Catholic Primary Academy | 312 | 1,415,299.52 | 1,493,588.81 | 5.5% |
| St Mary's Catholic Primary School, Wolverhampton | 434 | 2,125,931.03 | 2,246,165.51 | 5.7% |
| St Michael's Catholic Primary Academy and Nursery | 201 | 926,886.73 | 978,986.74 | 5.6% |
| Corpus Christi Catholic Primary Academy | 190 | 998,440.17 | 1,057,148.59 | 5.9% |
| St Teresa's Catholic Primary Academy | 168 | 919,939.62 | 972,770.95 | 5.7% |
| SS Peter and Paul Catholic Primary Academy & Nursery | 206 | 1,085,561.23 | 1,142,772.70 | 5.3% |
| Northwood Park Primary School | 573 | 2,715,602.73 | 2,869,347.19 | 5.7% |
| Edward the Elder Primary School | 215 | 1,091,843.97 | 1,156,808.66 | 5.9% |

| | | | | |
|---|------|--------------|---------------|-----------------|
| Moseley Park | 952 | 6,296,671.49 | 6,669,354.25 | 5.9% |
| Wednesfield High Academy | 880 | 5,719,133.87 | 6,052,538.25 | 5.8% |
| The Khalsa Academy Wolverhampton | 633 | 4,063,972.99 | 4,291,192.11 | 5.6% |
| Moreton School | 856 | 6,514,408.70 | 6,738,907.10 | 3.4% |
| Thomas Telford University Technical College | 545 | 3,842,449.35 | 3,978,825.71 | 3.5% |
| Ormiston SWB Academy | 1050 | 7,049,788.24 | 7,471,178.36 | 6.0% |
| Coppice Performing Arts School | 904 | 5,425,835.47 | 5,741,963.58 | 5.8% |
| Ormiston NEW Academy | 659 | 4,662,150.00 | 4,942,348.08 | 6.0% |
| Highfields School | 1351 | 9,841,561.40 | 10,512,305.58 | 6.8% |
| Smestow School | 611 | 4,184,020.89 | 4,425,355.85 | 5.8% |
| Heath Park | 990 | 7,268,236.98 | 7,747,541.01 | 6.6% |
| St Peter's Collegiate Academy | 1081 | 6,370,346.43 | 6,736,677.64 | 5.8% |
| St Edmunds Catholic Academy | 898 | 5,665,903.64 | 5,997,473.56 | 5.9% |
| Our Lady and St Chad Catholic Academy | 1009 | 6,770,728.70 | 7,179,166.31 | 6.0% |
| Wolverhampton Girls' High School | 790 | 4,386,361.52 | 4,538,213.19 | 3.5% |
| Aldersley High School | 1022 | 6,519,192.44 | 6,879,259.60 | 5.5% |
| The Royal School, Wolverhampton | 1218 | 6,256,040.97 | 6,600,877.58 | 5.5% |
| Wednesfield Technology Primary | 50 | 200,470.13 | 360,742.53 | N/a - part year |

City of Wolverhampton Council

SCHOOLS' FORUM

| | |
|------------------------|--|
| Date | 1 December 2022 |
| Report title | Maintained Nursery Supplement Update |
| Contact Officer | James Barlow, Finance Business Partner |
| Contact | james.barlow@wolverhampton.gov.uk |

Summary

This report provides an update to Schools' Forum on the use of annual surpluses in the Maintained Nursery Supplement (MNS) of the Early Years Block of Dedicated Schools Grant (DSG).

Decision

Members of Schools' Forum are asked to:

1. Note the allocations of annual surpluses in the Maintained Nursery Supplement (MNS) of the Early Years Block of Dedicated Schools Grant.

1.0 Background

- 1.1 The Council receives the Early Years Block element of DSG each year and is required to set an annual budget in consultation with Schools' Forum. One of the funding streams within the Early Years Block is the MNS.
- 1.2 MNS funding is provided to enable local authorities to protect their 2016 to 2017 funding rates for the universal 15-hour entitlement for MNS and the government expects it to be used in this way. The budget for these payments is approved each year by the Council and agreed with Schools' Forum at the February meeting. The government publishes in July following the end of each financial year, the final allocation for that financial year relating to MNS. These final annual allocations are shown in table 1 below, along with the expenditure for MNS each year.
- 1.3 As shown in Table 1, there has been an underspend each year and this created a surplus at the end of 2021-2022 of £182,090. The decision was therefore taken within the Council to pay over this surplus to Maintained nurseries, based on prior annual budgets and agreements with Schools' Forum. The allocations to individual nurseries were based on the latest pupil data submitted on the January 2022 Schools census, as shown in table 2 below.

Table 1 – MNS Five - year Allocation vs. Distribution

| Year | Allocation | Actual | Variance |
|-------------|-------------------|------------------|------------------|
| 2017- 2018 | 933,985 | 927,627 | - 6,358 |
| 2018 - 2019 | 957,554 | 834,077 | - 123,477 |
| 2019 - 2020 | 949,578 | 918,584 | - 30,994 |
| 2020 - 2021 | 926,130 | 911,638 | - 14,492 |
| 2021 - 2022 | 876,188 | 869,418 | - 6,770 |
| | 4,643,435 | 4,461,345 | - 182,090 |

Table 2 – Allocation of surplus to Nurseries in 2022 - 2023

| Nursery | Pupil No. Jan 2022 census | % | Allocation £ |
|----------------------|----------------------------------|----------|---------------------|
| Ashmore Park Nursery | 83 | 15% | 27,134 |
| Bilston Nursery | 101 | 18% | 33,018 |
| Bushbury Nursery | 62 | 11% | 20,269 |
| Eastfield Nursery | 92 | 17% | 30,076 |
| Low Hill Nursery | 108 | 19% | 35,306 |
| Phoenix Nursery | 40 | 7% | 13,076 |
| Windsor Nursery | 71 | 13% | 23,211 |
| | 557 | | 182,090 |