

# **BIRMINGHAM CITY COUNCIL**

## **BIRMINGHAM SCHOOLS FORUM COMMITTEE**

**THURSDAY, 07 DECEMBER 2023 AT 14:00 HOURS**  
**IN ON-LINE MEETING, MICROSOFT TEAMS**

### **A G E N D A**

#### **1 NOTICE OF RECORDING/WEBCAST**

The Chair to advise/meeting to note that this meeting will be webcast for live or subsequent broadcast via the Council's Public-I microsite ([please click this link](#)) and that members of the press/public may record and take photographs except where there are confidential or exempt items.

#### **2 APOLOGIES**

To receive any apologies.

#### **3 DECLARATIONS OF INTERESTS**

Members are reminded they must declare all relevant pecuniary and other registerable interests arising from any business to be discussed at this meeting.

If a disclosable pecuniary interest is declared a Member must not participate in any discussion or vote on the matter and must not remain in the room unless they have been granted a dispensation.

If other registerable interests are declared a Member may speak on the matter only if members of the public are allowed to speak at the meeting but otherwise must not take part in any discussion or vote on the matter and must not remain in the room unless they have been granted a dispensation.

If it is a 'sensitive interest', Members do not have to disclose the nature of the interest, just that they have an interest.

Information on the Local Government Association's Model Councillor Code of Conduct is set out via <http://bit.ly/3WtGQnN>. This includes, at Appendix 1, an interests flowchart which provides a simple guide to declaring interests at meetings.

**5 - 12**

4 **MINUTES – BIRMINGHAM SCHOOLS FORUM 26 OCTOBER 2023**

To confirm and sign the minutes of the previous meeting of the Schools Forum held on 26 October 2023.

5 **MATTERS ARISING FROM THE MINUTES**

Verbal update.

6 **MEMBERSHIP AND TERM OF OFFICE**

**13 - 24**

7 **LOCAL AUTHORITY UPDATE**

Report of the Strategic Director of Children and Families, the Director for SEND and Inclusion and the Strategic Lead for School Improvement Delivery.

General Updates:

- 1.) The Council's financial position
- 2.) Delivering better value

**25 - 32**

8 **FALLING PUPIL & GROWTH FUND**

Report of the Head of Service, Education and Skills.

9 **CSSB PROVISIONAL BUDGET FOR 2024/25**

Verbal update/ discussion item.

**33 - 38**

10 **BIRMINGHAM SCHOOLS BUDGET PROPOSAL 2024/25**

Report of the Schools Finance Business Partner.

**39 - 42**

11 **DE-DELEGATION PROPOSALS 2024-25**

Report of the Schools Finance Business Partner.

12 **ATTENDANCE REVIEW**

Item Description

13 **DATE AND TIME OF NEXT MEETING**

The next meeting is scheduled to take place on Thursday, 18 January 2024 at 1400 hours in Committee Rooms 3 & 4, Council House, Victoria Square, Birmingham.

14 **OTHER URGENT BUSINESS**

To consider any items of business by reason of special circumstances (to be specified) that in the opinion of the Chair are matters of urgency.



**BIRMINGHAM CITY COUNCIL**

**BIRMINGHAM  
SCHOOLS FORUM  
26 OCTOBER, 2023**

**MINUTES OF A MEETING OF BIRMINGHAM SCHOOLS FORUM  
COMMITTEE HELD ON THURSDAY, 26 OCTOBER, 2023 AT 1400  
HOURS ONLINE VIA MS TEAMS**

**PRESENT:-**

James Hill – Chair  
Mashuq Ally - Bordesley Green Girls' School  
Pam Garrington - Moor Hall Primary School  
Mike Dunn - Swanshurst School  
Steve Howell - City of Birmingham School  
Sean Delaney - Birmingham Federation of Nursery Schools  
Gill Gregory - Lindsworth School  
David Room - National Education Union  
Maxine Charles – Hall Green Junior School  
Anne Pendleton – Rednal Hill Primary School  
Chris Wilson – Education Impact Academy Trust  
Chris Townsend – Mainstream Academy

Councillor Karen McCarthy - Non-school representative (Cabinet member Children, Young People and Families)

Helen Ellis - Director for SEND And Inclusion  
Fiona Chamberlain - Schools Support Manager  
Sue Harrison - Strategic Director of Children & Families, Education & Skills  
Clare Sandland - Finance Business Partner – CYP  
Husham Khan - Interim Head of Schools Financial Services  
Carol Garfield  
Karen P Smith  
Raman Kaur - NHS  
Charlotte Bailey  
Ella Drake  
K Tague  
Kirsty Lister – Finance Manager  
Leslie Oosthuizen – Interim Finance Manager  
Eunice Onyema - Finance

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**NOTICE OF RECORDING/WEBCAST**

- 42 The Chair advised that this meeting will be webcast for live or subsequent broadcast via the Council's Public-I microsite ([please click this link](#)) and that members of the press/public may record and take photographs except where there are confidential or exempt items.

**The business of the meeting and all discussions in relation to individual reports are available for public inspection via the web-stream.**

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**APOLOGIES**

- 43 Apologies were received from Daniel Locke-Wheaton (Kate Tague substitute) and Dave Worledge, for non-attendance.

It was noted that Simon Bartlett had tendered his resignation this morning.

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**DECLARATIONS OF INTEREST**

- 44 Members were reminded they must declare all relevant pecuniary and other registerable interests arising from any business to be discussed at this meeting. If a disclosable pecuniary interest is declared a Member must not participate in any discussion or vote on the matter and must not remain in the room unless they have been granted a dispensation.

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The Chair asked that if Members had any other declarations of interests could they please share this in the chat. No declarations of interests were made.

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The Chair confirmed that the meeting was quorate.

**ELECT THE CHAIR AND VICE CHAIR**

- 45      There being no further nominations it was proposed by Sean Delaney and seconded by Pam Garrington, that the current Chair, James Hill be elected as the Chair of the Schools Forum. It was proposed by the Chair and seconded by Gill Gregory that Mike Dunn, be appointed as Vice Chair of the Schools Forum.
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**MINUTES – BIRMINGHAM SCHOOLS FORUM 22 JUNE 2023**

The Chair gave his appreciation for the availability of the agenda papers being more professional and made available on the Committee Management Information System (CMIS).

Maxine Charles informed that she attended the last meeting late however her attendance had not been recorded in the minutes. Gill Gregory asked that she be correctly recorded as being a representative of Lindsworth School and not St Vincent's.

- 46      **RESOLVED:-**

Subject to the above, the minutes of the last meeting held on 22 June, 2023, having been previously circulated were agreed by the School's Forum.

**The business of the meeting and all discussions in relation to individual reports was available for public inspection via the web-stream.**

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**MATTERS ARISING FROM THE MINUTES**

- 47      There were no matters arising from the minutes.
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**REVIEW OF ACADEMY REPRESENTATION ON THE FORUM**

- 48      A report of the Strategic Lead for School Improvement Delivery was submitted:-

(See document attached)

Fiona Chamberlain presented the report providing information to the School's Forum regarding proportionality between maintained and academy schools in Birmingham. The Forum were requested to consider whether they wished to align the proportions of representatives on the School's Forum in line with all schools in Birmingham.

Revised proportions were suggested in the report and Members were asked to vote on whether to adopt the revised proportions or to suggest an alternative model. The Chair asked for feedback and comments from Members. The Chair said in previous discussion there had been a

preference that the current representation was maintained and it was concurred with that it was a consensus among the group, including from Academy representatives. A comment was made that there were concerns and queries regarding the guidance on representation on academies governance/trustee representation as it seemed to be vague and needed to be reviewed.

Fiona Chamberlain undertook to take back the comments made to the Local Authority and to come back with some suggested proposals for membership for the Forum to consider at the next meeting.

It was noted that there were a number of vacancies also that a number of terms of office were due to expire in November. Fiona Chamberlain said she will be contacting the people whose terms of office run out in November along with committee services and also setting out what the election process will be so that people can consider whether they wish to stand.

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### **SCHOOLS FORUM CONSTITUTION**

The following report of the Strategic Lead for School Improvement Delivery was submitted:-

(See document attached)

Fiona Chamberlain presented the report for Forum members to vote on whether the constitution needed to be amended in terms of Forum membership, following the discussion earlier in the meeting.

Fiona Chamberlain undertook to provide some clarity regarding the Constitution and ensure that the Forum was fully compliant. She would bring back the Constitution to the Committee.

49

### **RESOLVED:-**

That the Constitution of the Birmingham Schools Forum be agreed in principle with the understanding that there would be some membership changes.

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### **LOCAL AUTHORITY UPDATE**

The report of the Director Children and Families, the Director for SEND and Inclusion and the Strategic Lead for School Improvement Delivery was attached.

Sue Harrison and Helen Ellis made a presentation with the use of slides.

(See presentation document attached)

The main points covered were:-



- General Updates
  - o The Council's financial position
  - o The Commissioner team and their areas of focus
- On 5 September 2023, Fiona Greenway (The Interim Director of Finance and Section 151 Officer) issued a S114 notice under the Local Finance Act. The S114 notice ensures that the Council can still provide its statutory services. Reassurance was given that ringfenced funding for Schools was safe.
- A second Section 114 notice had been issued on 21 September 2023.
- On 5 October the Secretary of State for the Department of Levelling Up, Housing and Communities announced a five-year intervention and appointed Commissioners. It was noted that Commissioner for Education and a Commissioner for Children's Services had not been appointed.
- BCC are committed to supporting schools and settings and ensuring the children and families of Birmingham receive the very best services possible
- BCC will continue to keep schools updated.

In addition it was noted that:

- Some emails had been received from head teachers who were worried whether their money was safe with the Council. Reassurance was given that it was and BCC will continue to deliver their frontline statutory services. Staff will continue to be paid and Pensions were safe.
- The SEND Commissioner would have a wider role

During the discussion the following comments were made:-

- The longstanding Equal Pay issue needed to be resolved. It was felt that cuts to BCC from Central Government had contributed to the current situation.
- Clarity was needed on whether there would be cuts to jobs and services as a way to cut expenditure.

In response to questions, the Forum were informed that:

- BCC's improvement plan was a public document and was being worked on.
- Work will continue with schools to ensure services were deployed in the best way possible. Sue Harrison had not had sight of any proposed operating model. However it was important to continue to work with partners.

- Updates to the improvement plan and proposals will be shared as well as timescales. The Council's improvement plan is a public document and BCC will be held to account publicly for delivering that plan.

• **SEND Locality Therapists and the Balanced System**

The report was presented to the Committee.

(See document attached)

A detailed document had been submitted together with Impact reports and SEND Locality Therapists Outcomes and KPIs followed by a lengthy presentation and discussion.

The background as set out in the report was following the Innovate to Save project, a number of locality-based Speech and language Therapists (SALT) and Occupational Therapists (OT) have been commissioned through the High Needs block to the value of £1.4m. The proposal is to increase the funding to £2.7m, shared equally across both SALT (through the Balanced System model) and the SEND Locality OT team.

They were keen for any head teachers or senior leaders in schools to join either the delivery group or the strategic group as they were keen to involve schools and make sure their voices were heard. It was felt it might be worth sending out what the expectations of the strategic group were, how often they met, and the representation on the group.

It was clarified that the Forum was being asked for feedback and consultation regarding this item. The Chair said that in principle, the Forum was in support of the recommendations and fully understand the need for the speech and language support from an educational point of view and the impact it had from an educational point of view. The Forum supported what had been identified in the report.

50

**RESOLVED:-**

That the Schools Forum supports the recommendations in the report.

• **Delivering Better Value update**

Helen Ellis updated the Schools Forum with regard to the initial position with regard to delivering better value programme (DBV). The findings regarding the DVB will be included in the improvement plan.

Delivering Better Value (DBV) was a programme working to identify and implement local and national opportunities to improve the outcomes for children and young people with SEND and place the system on a more sustainable financial footing, commissioned by the DfE and the background is set out in the report.

The evidence base developed for Birmingham will contribute to a grant application to the DfE for up to £1million for the local area to use to embed the identified opportunities.

The presentation set out key models and key areas of priority including the emerging findings. It had been recognised that the number of ECHP requests had increased. Mainstream schools were under strain with the number of pupils with complex needs.

Some schools have seen another huge rise in numbers in reception again this year and Headteachers were concerned about the level of need they were currently having to deal with in school and reported that they had been turned down for funding. Parents were also concerned at how they would be supported.

They would be grateful to get a few more responses to the survey. The emerging themes from the findings will be reported back.

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### **INDUCTION SESSION FOR NEW MEMBERS OF THE SCHOOLS FORUM**

The following report of the Strategic Lead for School Improvement Delivery was submitted:-

(See document attached)

The Forum discussed the need for induction training for new members of the Schools Forum. During a brief discussion it was noted that there was one member due for induction. There were a number of vacancies and also a number of terms of appointees that were due to expire. It was suggested that the induction session should be carried out next term so that everyone is captured in one go with another session taking place in the summer.

It was requested that the DBV survey link be shared and sent out to as many people as possible.

51 **RESOLVED:-**

That the induction session should take place after the next tranche of Members were appointed with another session in the summer.

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### **DEDICATED SCHOOLS GRANT OUTTURN 2022-23**

Kirsty Lister, Finance Business Partner for schools funding presented this item informing that she had started this role in early October. The outturn report was not available as they thought it would need to be reviewed by the Commissioners prior to being submitted to the Forum and owing to the timing involved they had focussed on schools close down balances which

were now completed. There will be no more adjustments. It is hoped that schools would have their balances the first week after the half term. The outturn report will be circulated during November and submitted to the Committee in December.

52      **RESOLVED:-**

That the Dedicated Schools Grant Outturn be submitted to the meeting in December, 2023.

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**WORK PROGRAMME FOR SCHOOLS FORUM 2023-2024**

The Forum considered the Work Programme for 2023/24:-

(See work programme attached)

Following a brief discussion it was –

53      **RESOLVED:-**

That the work programme for the Schools Forum 2023-2024 be agreed and should include:-

School's Forum Constitution - December  
Dedicated Schools Grant Outturn 2022-23 - December

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**DATE AND TIME OF NEXT MEETING**

54      The next meeting is scheduled to take place on Thursday, 07 December 2023 at 1400 hours via MS Teams.

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**OTHER URGENT BUSINESS**

55      There was no other urgent business.

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The meeting ended at 1533 hours.

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CHAIR

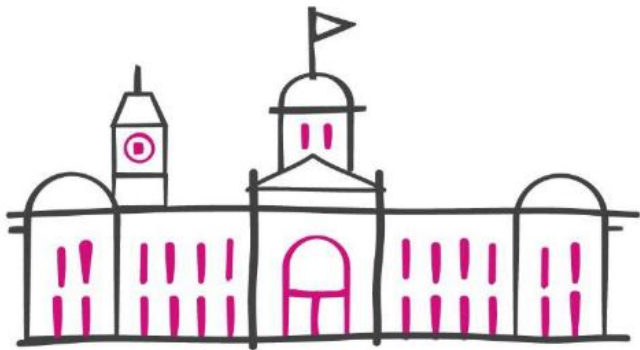
# Schools Forum

## Local Authority Update – December 2023

Sue Harrison – Director Children and Families

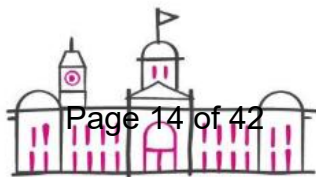
Helen Ellis – Director for SEND and Inclusion

Fiona Chamberlain – Strategic Lead for School Improvement Delivery



# Agenda

- General Updates
  - The Council's financial position
- Delivering Better Value



# General Updates



# The Council's financial position

- The financial position of the council remains very challenging.
- A report went to Cabinet on Tuesday 14<sup>th</sup> November setting out a forecast budget gap of £164.8m in 2024/25, rising to £177.1m in 2025/26.
- This means the council must find savings of £200m over the next two financial years (£165m in the 2024/25 financial year and an additional £35m in the 2025/26 financial year).
- The Commissioners have stated that the Council must urgently identify viable savings options for both 2024/25 and 2025/26.
- Draft budget proposals are set to be published in December for formal consultation and public engagement.
- As a directorate we are committed to protecting services for children and families and the council remains committed to our SEND improvement journey.
- Schools will continue to be updated on the council's financial position.



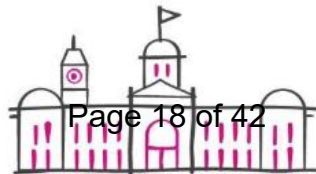


# Delivering Better Value



# Delivering Better Value in SEND

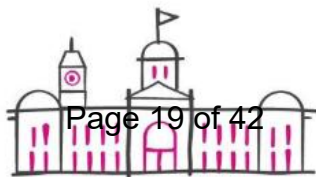
- Birmingham City Council is participating in the Delivering Better Value Programme. Delivering Better Value (DBV) is a programme working to identify and implement local and national opportunities to improve the outcomes for children and young people with SEND, commissioned by the DfE.
- The evidence base developed will contribute to a grant application to the DfE for up to £1million.
- We are now in Module 3 of the local programme working towards submitting the grant application by 14 December 2023.



# Through wide evidence gathering some key themes emerged

## What we heard

- **Parents did not believe mainstream schools could meet their child's needs**
  - They wanted to see more 1:1 support for their child to express feelings and with emotional needs
  - They want to see greater flexibility and adaptations to curriculum
  - They want their child to feel included and be understood
- **Schools told us they can't meet needs of children in their settings**
  - Providing additional 1:1 time was the top response to what would allow you to more effectively meet need. SENCOs spoke of trying to achieve a whole school approach to SEND and time need to support staff with this mindset shift.
  - Education professionals told us conversations with parents/carers are becoming more challenging, both in terms of them accepting SEN and not being able to offer everything they need
  - Wider facilities and funding were both raised as barriers to being able to more effectively support SEND in settings.



# What are the focus areas for the grant?

1

Developing a shared understanding across the local area including schools and settings about what needs can, and should, be met in mainstream, RB and special schools, in line with the expectations of the national SEND and AP Improvement Plan 2023.

2

Reviewing funding arrangements, including SSPPs, to ensure that there is clarity for schools and settings about how much money they will receive for each pupil and how the decision regarding funding has been made

3

Leadership Development for leaders with responsibility for SEND to ensure alignment and motivation across the system for areas 1 & 2 to succeed.



# What happens next

- Over 600 people from across the sector including parents & carers, education professionals, health, social care and children and young people themselves have engaged with the evidence gathering activities.
- This has been through case reviews, surveys, listening forums, interviews and more.
- Should the grant application be successful, we move to the implementation phase where we will begin co-production to design the changes under the key themes identified. All activity will be aligned with our wider work under the SEND strategy.



# Thank you!



**RESET**



**RESHAPE**



**RESTART**



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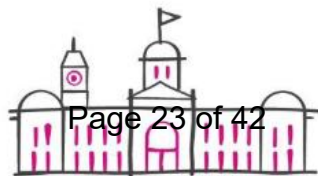
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**Report to:** Schools' Forum

**Date:** 7<sup>th</sup> December 2023

**Report of:** Jaswinder Didially

**Title:** Growth Fund Criteria 2024/25

**Status:** For discussion

## **1. Introduction**

Local Authorities are permitted to retain funding to support Primary and Secondary schools (including Academies and Free Schools) with significant in-year growth in pupil numbers from Reception to year 11. Both the amount and criteria must be agreed by Schools' Forum and in accordance with criteria set by the Department for Education.

The growth fund must not be used to support:

- schools in financial difficulty
- general growth due to popularity - this is managed through lagged funding

Pupil number growth arises from two key sources: increased birth rates and in-year net migration into the City's schools. This is covered in Part A of this report.

In-year admissions will be required in the event of school or school phase closure to manage pupil displacement as part of Basic Need. This is covered in part B of this report.

New schools or school phases will be required to meet future Basic Need, particularly for secondary provision. This is covered in part C of this report.

None of the Growth Fund is retained or used by the LA for any other purposes. The purpose of this report is to seek agreement to the criteria for 2024/25.

**Part A: Growth to meet Basic Need; increased births and in-year cohort growth from migration**

**A1. 2024/25 Basic Need Growth Fund Requirement**

To enable the Local Authority to fulfil its duty to secure sufficient primary and secondary school places, maintained schools and academies may admit additional pupils' part way through a financial year. This is the principal criterion for the use of the Growth Fund.

**A2. Criteria to determine in-year Growth allocation**

The proposed criterion for 2024/25 covers growth through:

- Basic need expansions (permanent and bulge) approved by the local authority as these are not captured in the October census until the following year.
- Admittance of over 30 pupils through in-year demand. These are pupils that would not be captured in the October census until the following year.

Schools who have been commissioned to grow through the LA will automatically be funded for the agreed places without the need for a business case.

Please Note

- The Growth Fund cannot be used to allocate funding for general increases in pupil numbers or where the school has for example missed pupil numbers in submitting the October census returns.

**A3. Part A. Recommendation**

Schools' Forum to agree the criteria as set out above.

## **Part B: Growth in pupil numbers at receiving schools following a local school closure**

### **B1. School Closure Funding criteria**

In the unusual event of school closure, local schools will be required to admit additional pupils across multiple year groups where dispersal of existing pupils is required. This is considered Basic Need and does not include schools which are closing through academy conversion.

### **B2. School Phase Closure (as a result of a Change of Age Range) Funding criteria**

In the event of school reorganisation and a change of age range leading to the closure of a phase of education (for example an all-through school removing its primary provision to become a secondary school), local schools will be required to admit additional pupils across year groups where dispersal of existing pupils is required.

It is expected that the School Budget Share for the period of the financial year that the school phase is to be closed will be retained by the Local Authority and can be made available as Growth Fund to provide for pupils displaced from the school that is being closed. The funding made available from school phase closure, to be redistributed through Growth Fund, is entirely separate from the identified cash-limited pot agreed to fund basic need growth.

### **B3. Part B Recommendations**

Schools' Forum to agree to an approach whereby in the exceptional circumstance of a school/phase closure the funding rate for transferred pupils is tailored to individual school and pupil circumstances subject to sufficient funding within the retained School Budget Share from the closing school or closing school phase. Should this arise, the detail will be presented by report at a future forum.

## **Part C: New schools or new school phases to meet Basic Need**

### **C1. New Schools or New School Phase Funding Criteria**

To enable the Local Authority to fulfil its duty to secure sufficient primary and secondary school places in line with Basic Need, new schools or school phases may be proposed, for example a new school under the Free School presumption route, or a primary school becoming an all-through school.

### **C2. Set-Up Allocations for New Schools or New School Phases**

It is proposed that the allocations agreed for new schools or new school phases for 2024/25, is as follows:

- For the new schools or school phases, they will be funded at PAN to reflect their agreed new intake. No free schools or school phases are planned for opening during 2024/25.
- Other capacity building costs and set up costs will be received directly through the DfE's central free school programme.

### **C3. Part C. Recommendations**

Schools' Forum to agree the criteria as set out above

**Part D: Overall recommendation of Growth Fund criteria to meet Basic Need (including new schools) and school or school phase closures**

**D1. 2024/25 Basic Need Growth Fund Recommendations**

The growth funding criteria outlined across parts A-C is agreed.

The growth fund will be subject to changes in the event of school closures or school phase closures (as outlined in Part B).

Reports will be presented to school forum detailing any changes in the growth fund budget. A report on the actual spend for 2024/25 will be presented during January 2026.

**D2. Funding Rates for Growth Funding criteria**

Proposed growth funding requirements to meet Basic Need will be consulted on at the next School Forum Technical Meeting and likely to be allocated in line with the AWPU funding rates used in Birmingham's 2024/25 Fair Funding Formula, subject to sufficient funding being available within the Growth Fund.

Given the Growth Fund to meet Basic Need is cash limited BCC will reserve the right to scale back the AWPU rate to remain within budget.

This report is for information purposes only.



**Report to:** Schools' Forum

**Date:** 7th December 2023

**Report of:** Jaswinder Didially

**Title:** Falling Rolls Fund Criteria 2024/25

**Status:** For Discussion

## 1. Introduction

Since the introduction of the National Funding Formula in 2018-19, local authorities have been able to operate a falling rolls fund to support schools which see a short-term fall in the number of pupils on roll. For the first time, in 2024-25 funding will be allocated to local authorities on the basis of falling rolls, as well as growth.

Falling rolls funding will be distributed on the basis of the reduction in pupil numbers that local authorities experience for each year. It is based on the observed differences between the primary and secondary number on roll in the local authority between the most recent October pupil census, and the census in the previous October.

Local authorities will continue to have discretion over whether or not to operate a falling rolls fund.

Where local authorities operate a fund, they will only be able to provide funding where the 2022 school capacity data (SCAP) shows that school places will be required in the subsequent three to five years.

The restriction, that funding can only be provided to schools judged "Good" or "Outstanding" in their latest Ofsted judgement will be removed from 2024-25.

## 2. Proposed Criteria

Support will **only** be available for schools:

- Surplus capacity exceeds 15% and numbers on roll are at least 5% lower than October 2023 census. Surplus capacity is defined as the difference between number on roll versus operational capacity (this could be Published Admission Number (PAN) or Current Pupil Number (CPN), whereby a lower operational number is in practice).
- Local planning data shows the places will be required within the next 2 academic years.

- The school will need to make redundancies in order to contain spending within its formula budget. Schools will be funded for April-August allocation if required to meet staffing costs until end of academic year.
- School does not have a surplus balance in excess of 5% of its school budget share as at 31<sup>st</sup> March 2023 and 31<sup>st</sup> March 2024 (or the relevant academic years in the case of academies).

Schools who meet the above criteria in 2024/25 will be eligible to prepare a Business Case for approval by the authority. Any agreed funding will be for a specified number of surplus places (within the operational PAN) pro-rated based on the point in the year, funding permitted.

### **Funding Rates for Falling Pupil Funding criteria**

Proposed Falling Pupil funding requirements will be consulted on at the next School Forum Technical Meeting and likely to be allocated in line with the AWPU funding rates used in Birmingham's 2024/25 Fair Funding Formula, subject to sufficient funding being available within the Falling Pupil Fund.

Given the Falling Pupil Fund is cash limited BCC will reserve the right to scale back the AWPU rate to remain within budget.

This report is for information purposes only



**Report to:** Schools Forum

**Date:** 7<sup>th</sup> December 2023

**Report of:** Kirsty Lister, Schools Finance Business Partner

**Title:** Mainstream Schools 2024-25 Funding Formula Update

**Status:** For Information

### **Purpose**

The purpose of this report is to inform Schools Forum of key National Funding Formula (NFF) changes for 2024-25

### **Background**

Each year local authorities are required to detail their schools block funding formulae in accordance with the arrangements set out by the Secretary of State for Education. The Education and Skills Funding Agency (ESFA) has developed the authority proforma tool (APT) to assist local authorities to model, and then confirm how they plan to do this for the funding year.

Our current modelling and forecasts are based on the APT issued in October 2023 for the 2024-25 schools block funding formulae. The APT is populated with schools' block data primarily drawn from the October 2022 schools census, but with a forecast of pupil numbers for October 2023.

Final allocations of mainstream schools and central schools services funding for 2024-25 will be calculated in December 2023, based on the latest pupil data at that point (October 2023), and published to Local Authorities

The December DSG allocations will also include updated high needs funding allocations, based on the latest pupil data, but these are not final as there will be a further adjustment in 2024. As normal, local authorities will use the December allocations to finalise their schools' and high needs budgets

The final version of the APT will be released in December 2023 and must be returned to the ESFA by **19 January 2024**. The schools block data in the December version will be updated to use the October 2023 census.

## 2024/25 National Funding Formulae Update

- The overall structure of the formula is the same as in 2023-24. Most factors have increased by 1.9%, but with some exceptions.
- The ESFA have introduced a formulaic approach to allocating split sites funding in 2024-25. This ensures that split sites funding will be provided on a consistent basis across the country.
- Through the minimum per pupil funding levels, every primary school will receive at least £4,610 per pupil, and every secondary school at least £5,995
- The funding floor will ensure that every school will attract at least 0.5% more pupil-led funding per pupil, compared to its 2023-24 allocation.
- The core factors in the schools NFF (such as basic entitlement and the lump sum that all schools attract) will increase by 1.4%.
- The 2023-24 mainstream schools additional grant (MSAG) will be rolled into the schools NFF ensuring that this additional funding forms an on-going part of the schools' core budgets. Appropriate adjustments have been made to NFF factor values and baselines to reflect this.
- TPAG will be allocated outside of the NFF in 2024-25
- Local Authorities will be funded for falling rolls as well as growth.

Appendix 1 shows a list of NFF factors and rates set out in the NFF guidance.

## Government National Funding Formula Expectations

Every school must receive a minimum of £4,610 per pupil for primary schools, and £5,995 per pupil funding for secondary schools (KS3: £5,503, KS4: £6,033). This has been reflected in the APT.

Primary	Secondary	Secondary (KS3 only)	Secondary (KS4 only)
£4,610.00	£5,995.00	£5,503.00	£6,033.00

## **Birmingham Methodologies**

Apart from applying the rates specified in NFF Guidance, our forecast has increased the following factors in the APT:

- Split sites: increase by 1.9% in line with general NFF factor increase rate
- PFI top ups for PPP1 schools: increase by 10% - Provisional increase, to be confirmed then final allocation
- NNDR business rates: 3% increase applied
- The council has applied the NFF rates in the APT, with the maximum MFG 0.5% in line with NFF guidance. This is to be reviewed/discussed when final allocations have been received

This report is for information purposes only. A Technical Group meet will be set up in December where any required decisions needed from Forum, for budget setting purposes, can be made. A draft APT position will also be discussed at this meeting to ensure all factors have been discussed and agreed, where applicable, in order to set a balanced budget for 2024/25

## Appendix 1: List of NFF Factors and Rates for 2024-25

Factor	Unit Values
<b>Basic per pupil Funding</b>	
<b>Basic entitlement</b>	
Primary basic entitlement	£3,562
KS3 basic entitlement	£5,022
KS4 basic entitlement	£5,661
<b>Minimum per pupil</b>	
Primary Minimum Per Pupil funding	£4,610
Secondary Minimum Per Pupil funding	£5,995
<b>Additional Needs Funding</b>	
<b>Deprivation</b>	
Primary FSM	£490
Secondary FSM	£490
Primary FSM6	£820
Secondary FSM6	£1,200
Primary IDACI F	£235
Primary IDACI E	£285
Primary IDACI D	£445
Primary IDACI C	£485
Primary IDACI B	£515
Primary IDACI A	£680
Secondary IDACI F	£340
Secondary IDACI E	£450
Secondary IDACI D	£630
Secondary IDACI C	£690
Secondary IDACI B	£740
Secondary IDACI A	£945
<b>English as an Additional Language</b>	
Primary EAL3	£590
Secondary EAL3	£1,585
<b>Low Prior Attainment</b>	
Primary LPA	£1,170
Secondary LPA	£1,775
<b>Mobility</b>	
Primary mobility	£960
Secondary mobility	£1,380
<b>School Led Funding</b>	
<b>Lump Sum</b>	
Primary lump sum	£134,400
Secondary lump sum	£134,400
<b>Sparsity</b>	
Primary sparsity	£57,100
Secondary sparsity	£83,000
Middle-school sparsity	£83,000
All-through sparsity	£83,000
<b>Split Site Funding</b>	
Split sites basic eligibility funding	£53,888
Split sites distance funding	£26,994

- **All factors are mandatory except** Split sites, Rates, Private finance initiative (PFI) contracts and Exceptional circumstances (with ESFA agreement)

**Source:**

**The national funding formulae for schools and high needs 2024-25**

Published by DFE @October 2023



**Report to:** Schools Forum

**Date:** 7<sup>th</sup> December 2023

**Report of:** Kirsty Lister, Schools Finance Business Partner

**Title:** De-Delegated Budgets Proposal for 2024/25

**Status:** For Discussion

## **1. Purpose of the Report**

This report covers prescribed activities/commitments that are required to be delegated through the mainstream Reception to Year 11 formula, but for which the LA can propose de-delegation for LA maintained primary and secondary schools only.

De-delegation does not apply to special schools, nursery schools, or PRUs

Schools forum members for primary maintained schools and secondary maintained schools must as set out in the Schools Forums (England) Regulations 2012 decide separately for each phase whether the service should be provided centrally; the decision will apply to all maintained mainstream schools in that phase

They must decide on fixed contributions for these services so that funding can then be removed from the formula before school budgets are issued

For 2024/25 the LA is to propose the continuation of three existing de-delegation areas of commitment

## **2. De-Delegation areas**

**The three existing areas are:**

- Contingencies: to fund residual costs arising from the opening/closing of schools, deficits of discontinued schools, schools in financial difficulties, and other expenditure where the circumstances were unforeseen.
- Facilities Time: this enables the costs of releasing city-wide union representatives to be shared between schools, so that they do not fall disproportionately on the staffing of a small number of schools with these representatives.
- Behavioural Support Services: this is part of helping to sustain inclusion. The budget will allow resourcing of short-term programmes and preventative type work via the City of Birmingham School to continue while alternative models are developed for future years.

We propose to increase the unit rate by 3% as per National Funding Formula increase per pupil based on the rate in 2023/24, however academisation and pupil number changes will effect the overall de-delegation amount per schools

The LA seeks response from Forum members representing maintained primary and secondary schools only, to agree to continue the above three areas for de-delegation for 2024/25 and the increase of 3% (see Appendix 1 table).

### **Other background**

De-delegation is not an option for Nursery Schools, Special Schools, PRUs or Academies. Their proportion of the budget is already delegated.

It is to be noted that for each proposed area for de-delegation, it is for the Schools Forum members in the relevant phase (primary or secondary) to decide whether that service should be provided centrally. The decision would apply to all maintained mainstream schools in that phase and result in the funding for these services being removed from the formula before school budgets are issued. There could be different decisions made for each phase.

Other possible items which can be de-delegated include:

- Free School Meals eligibility
- School Improvement
- Insurance
- Licences / Subscriptions
- Staff costs – supply cover excluding facility time
- Support to underperforming ethnic minority groups and bilingual learners
- Museum and library services

Schools' Forum representatives for the relevant phases have previously decided not to de - delegate these aspects, therefore figures have not been provided.

The consultation will be published to all schools and the responses will be collated and summarised for the forum. Schools Forum will then be asked to vote on each de-delegation proposal on behalf of each sector



## Appendix 1: De-Delegation Items Proposal for 2024/25

De-Delegation Item	NOR 2023/24	£ Unit Rate 2023/24	£ 2023/24 Amount	NOR forecast 2024/25	£ Unit Rate 2024/25	£ 2024/25 Forecast
Contingencies-Primary	56,077	15.23	854,053	55,399	15.69	869,210
Contingencies-Secondary	14,801	15.23	225,419	14,793	15.69	232,102
Staff costs supply cover -Primary	56,077	4.32	242,252	55,399	4.45	246,526
Staff costs supply cover -Secondary	14,801	3.55	52,543	14,793	3.66	54,142
Behaviour support services-Primary	56,077	4.79	268,608	55,399	4.93	273,117
<b>Total</b>			<b>1,642,875</b>			<b>1,675,097</b>

NOR – Number on roll

