



Schools Forum

Date: Monday, 12 June 2023

Time: 4.00 pm

Venue: To be held virtually over Zoom

Everyone is welcome to attend this committee meeting.

Membership of the Schools Forum

Secondary Sector Headteachers (1) Lee Ormsby

Primary Sector Headteachers (4) Mike Cooke, Hatim Kapacee, Saeeda Ishaq, Gavin Shortall

Primary Sector Governors (3) Tony Daly, Philip Geldard, Lolita Hall, Angela Stansfield, Iram Cheema

Special School Headteachers (1) Alan Braven

Special School Governor (1) Walid Omara

Academy Representative (7) Joseph Brownridge, Helen Child, Andy Park, Joshua Rowe, Edward Vitalis, Karl Harrison, Jill Usher

Pupil Referral Unit Representative (1) Colin Harvey-Rigby

Nursery School Representative (1) Amy Davenport

Non-School Members (5) Councillor Reid, Cath Baggaley, John Morgan, Antonio de Paola, Isabelle Qamar

Agenda

- 1. Urgent Business**
To consider any items which the Chair has agreed to have submitted as urgent
- 2. Appeals**
To consider any appeals from the public against refusal to allow inspection of background documents and/or the inclusion of items in the confidential part of the agenda
- 3. Minutes** 5 - 8
To approve as a correct record the minutes of the last meeting held on 16 January 2023.
- 4. March Report Feedback - Budget 2023/24 Update** 9 - 16
The report of the Directorate Finance Lead – Education and Schools is enclosed.
- 5. Dedicated Schools Grant (DSG) and School Balances 2022/23 Outturn** 17 - 28
The report of the Directorate Finance Lead – Children’s and Schools is enclosed.
- 6. Outcome of the National Funding Formula (NFF) Consultation** 29 - 36
The report of the Directorate Finance Lead – Schools and Education is enclosed.
- 7. Forward Plan - Academic Year 2023/24** 37 - 38
The report of the Directorate Finance Lead - Children’s and Schools is enclosed.

Information about the Forum

Schools are represented on the Forum by headteachers and school governors, elected to reflect all categories of school. In Manchester; there are non-school representatives from the teacher associations; additional non-voting places are reserved for invited elected members and representatives of other interested bodies.

The Forum members work together to provide a clear consensus of professional advice to education decision-makers, to achieve a transparent deployment of available resources. The Forum provides a formal channel of communication between the Council and schools for consultation concerning the funding of schools, and aims to agree recommendations which present the best possible compromise between competing claims on limited resources; has strategic oversight of ALL funding decisions affecting schools, and is involved in annual consultation in respect of the Council's functions relating to the schools budget in connection with the following:

- pupils with SEN (Special Educational Needs)
- early years
- revisions to the Council's scheme for the financing of schools
- administration of central government grants to schools including Standards Funds
- arrangements for free school meals

The Forum must be consulted on any proposed changes to the Council's school funding formula, and the financial effects of any proposed changes.

Smoking is not allowed in Council buildings.

Joanne Roney OBE
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Further Information

For help, advice and information about this meeting please contact the Committee Officer:

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This agenda was issued on **Thursday, 8 June 2023** by the Governance and Scrutiny Support Unit, Manchester City Council, Level 2, Town Hall Extension (Library Walk), Manchester M60 2LA

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Manchester Schools Forum

Minutes of the meeting held on 16 January 2023

Present: Andy Park, Anne Summerfield, Katherine Grayson, Mike Cooke, Edward Vitalis, Cathryn Baggaley, Alan Braven, Joseph Brownridge, Amy Davenport, Amanda Corcoran, Saeeda Ishaq, Tony Daly, Paul Greenwood, Hatim Kapacee, Vandhna Kohli, Cllr Reid.

New Members: Lee Ormsby and Isabelle Qamar

Also Present: Ruby Qaimkhani (MMU observer)

Apologies: Helen Child, John Morgan, Gavin Shortall, Andrew Burton and Antonio de Paola

SF/23/01 Minutes

The minutes of the meeting held on 14 November 2022 were submitted for consideration as a correct record. It was noted that the new potential school milk provider was not a non-profit organisation, as previously thought. This information was circulated to the Forum by the Directorate Finance Lead – Education and Schools following the meeting held on 14 November 2022.

Decision

To agree the minutes of the meeting held on 14 November 2022 as a correct record, subject to the above amendment.

SF/23/02 Consultation outcome – Updates to Scheme for Financing Schools (Excessive balance mechanism)

The Forum considered a report of the Directorate Finance Lead – Education and Schools which sought comment and approval of Maintained School Forum members for the revision of the Scheme for Financing Schools. The Scheme sets out the principles underlying the funding of schools, and the basis for the financial relationship between maintained schools in Manchester and the Council.

The proposed two revisions are local changes to ensure the Scheme for Financing Schools reflects current practices and ways of working. The changes include an update to the excessive balance control mechanism (following the review reported to School Forum on 14 November 2022) and the provision of quarterly financial information. A Schools' consultation opened on 5 December 2022, with the deadline for responses 16 December 2022. In total, 21 schools responded which was a response rate of around 19%.

The first question of the consultation looked at Schools quarterly budget monitoring reports to include the updated three-year budget forecast with underlying assumptions on which financial plans are based (Scheme reference: 2.1.1). In total, 20 schools were in favour, with one opposed. Those in favour noted the pertinence in

the current climate to ensure that assumptions are updated, reflected on budgets and reported on. One response requested that the budget assumption form was made more user friendly, something the Council are currently reviewing. The school opposed to this had concerns over the time taken with no real tangible outcome. They felt that nothing is gained from making assumptions for three years in the future as they had been struggling to make assumptions three months into the future.

The second part of the consultations related to allowing the Council to clawback balances above the allowable threshold that had been held for more than 2 years, subject to the appeals process (Scheme reference: 4.2). It was proposed that the change will apply to balances as of 31 March 2024, with the clawback percentage rate remaining at that agreed by Schools Forum. From the 21 responses, 15 were in favour and 6 were opposed. Comments from those in favour and opposed were provided to Schools Forum. Of those opposed, 5 were concerned about how this would affect capital projects. Those schools were provided with information detailing the Council's process on holding maintained school funds in a ring-fenced reserve for capital projects and this information was to be shared via a school circular.

Maintained School Forum members were asked to comment and decide if they approve the revisions to the scheme:

Q1. School's quarterly budget monitoring reports to include the updated three-year budget forecast with underlying assumptions on which financial plans are based on (**Scheme Ref: 2.1.1**).

Q2. The Council to clawback balances above the allowable threshold that have been held for more than 2 years. Subject to appeals process. (**Scheme Ref: 4.2**). Proposed that this change applies to balances as of the 31 March 2024.

There was no forthcoming comments and the Chair proceeded to the vote of maintained school representatives on the proposals. 6 representatives were present and all 6 agreed to the proposals.

Decision

To approve the following:

- School's quarterly budget monitoring reports to include the updated three-year budget forecast with underlying assumptions on which financial plans are based on (**Scheme Ref: 2.1.1**).
- The Council to clawback balances above the allowable threshold that have been held for more than 2 years, subject to the appeals process. (**Scheme Ref: 4.2**). This change applies to balances as of the 31 March 2024.

SF/23/03 Dedicated Schools Grant 2023/24

The Forum considered a report of the Head of Finance – Children's and Schools which covered the dedicated school grant 2023/24 settlement, outlining the allocation across individual school budgets and the Council's retained schools' budget.

Key points to note were as follows:

- DSG had increased by £38m
- Additional schools funding of £22m: Mainstream Schools receive £17m and the High Needs Block £5m.

All School Forum members were asked to provide a view and comment on:

- All Manchester primary and secondary schools should receive a per pupil increase between 0.5% minimum and up to 3.2% on pupil-led funding.
- Manchester did not intend to propose a 0.5% transfer from the school block to the high needs block in 2023/24.
- Special schools banded funding to increase by 6.5%, to incorporate Teacher's Pay Grant and Teachers' Pension Employer Contribution Grant.
- Early year two-year-old base rate increase by 6p, with an increase of 22p for three and four-year olds. This would be passed onto providers by increasing the base rate by 5p per hour and adding a new quality supplement of 17p per hour to reflect the rolling in TPG and TPEGC into the funding formula.
- Central services school block funding has reduced on per pupil basis by 2.5% despite there being an additional burden due to the new admission code, with no reduction in other functions councils are required to provide.
- Additional Schools Funding 2023/24 will be allocated as a separate grant for mainstream schools. Special schools will receive a 3.4% funding increase on top of the average place and top-up rates, following DfE formula.

The Chair invited questions. A member raised a point of accuracy from the report that The Barlow RC High School was not an Academy.

A member questioned if the £8m increase in the High Needs Block was what was expected and what impact that had on the High Needs Recovery Plan. The amount received was slightly higher than was anticipated. In relation to the High Needs Recovery Plan, the total additional funding was £13m for the high needs block. A report was brought to School's Forum in September on the High Needs Recovery Plan. It was noted that the risk was if the gap does not reduce, there could be a significant deficit, up to £33m by 2024/25 without a strategy. The Recovery Plan aimed to drive through changes and reduce that deficit. Due to the extra money received and anticipated outcomes of strategies on the Recovery Plan, there was no proposal for the 0.5% transfer from the school block to the high needs block in 2023/24. The reason for that was that there were a number of strategies to reduce the sharp increase in the number of EHCP's in the City. With having slightly more money than anticipated, it was affordable to allow time for strategies to start to reduce the gap and produce a balanced budget. The 0.5% transfer remains in the recovery plan to be reviewed ready for 2024/25 if strategies do not work as intended.

A Local Ward Councillor queried the reason for pushing back the 0.5% transfer for a year. It was noted that this did not necessarily mean the transfer would happen in the next year. The idea remained on the Recovery Plan to be kept under review. It was not needed for 2023/24 and it was hoped that the strategies in place would begin to have an impact in the time allowed. To not complete the 0.5% transfer leaves more money in schools to assist with the implemented strategies.

On Early Years funding, it was questioned if the 17p included all Early Years

Teachers. It was stated that this would include any teacher who was part of Teachers Pension Scheme, and the consultation would go to all settings who employed staff under the teacher's pay and conditions.

A member sought clarity on what to anticipate in terms of pay increases for teachers and support staff for budget assumptions in the next academic year. It was noted that for support staff the advice was to look at building in around a 4% increase but that this was only a prediction.

Another member sought clarity on when it was expected that schools receive their final statements for 2023/24. It was stated that the final statements should be out before February half-term.

It was requested that a report was provided to Special Schools to explain the funding changes, and this was agreed to.

The Chair thanked Officers for the level of detail contained within the report.

Decision

To note the report.

**Manchester City Council
Report for Information**

Report to: Schools Forum

Subject: Budget 2023/24 Update

Report of: Directorate Finance Lead – Education and Schools

Summary

School forum report Budget 2023/24 Update (see appendix one below), was circulated to all school forum members on Monday 13 March 2023, the report asked for members to provide a view and comment on:

- The outcome of the early years' consultation on the new quality supplement to the 3-and 4-year-old funding formula for 2023/24
- A review on the early years' quality supplement, including what/if criteria should be used to determine quality from April 2024.
- Schools block funding allocation relating to impact of inflation on the two PFI schools.

The following comments was received:

- a. I am happy to support the increase for the PFI schools
- b. Thank you for the report and the summary in the main body of the email. All looks fine.
- c. I wish to highlight comments made on the consultation that the contribution made by early years settings is still being overlooked and unless some decent funding is provided, they will not be able to remain sustainable. This will have a negative impact on school such as less children ready for school in nursery & reception, children/families not accessing early intervention (SEND children, children on the WellComm and Children in Needs) and children coming to school without relevant assessment such as EHCP or EHA.

Outcome

The report included the results of the Early Year consultation (appendix one, para.2), given that 71% the respondents agreed for a review on the early years' quality supplement, including what/if criteria should be used to determine quality from April 2024, that a working group is set up to carry out this review.

APPENDIX ONE: Report to School Forum 12 March 2023:**Manchester City Council
Report for Resolution**

Report to: Schools Forum

Subject: Budget 2023/24 Update

Report of: Directorate Finance Lead – Education and Schools

Summary

January 2023 School Forum's agenda provided Dedicated Schools Grant - 2023/24 budget, agenda item 5. This report provides updates on:

- outcome of the early years' consultation
- impact of inflation on the two Private Finance Initiatives (PFI) schools.

Early Years

In January 2023 the Council opened a consultation for all Manchester early years providers on the change of adding a new quality supplement to eligible setting as from April 2023.

Schools Block

At the time of presenting the Schools Budget to January's Schools Forum the impact of inflation on the two Private Finance Initiative (PFI) schools was not fully understood. This report provides an update on the inflationary impact on the PFI schools.

Recommendations

Schools Forum Members are asked to provide a view and comment on:

- The outcome of the early years' consultation on the new quality supplement to the 3-and 4-year-old funding formula for 2023/24
 - A review on the early years' quality supplement, including what criteria should be used to determine quality from April 2024.
 - Schools block funding allocation relating to impact of inflation on the two PFI schools.
-

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Background documents (available for public inspection):

The following documents disclose important facts on which the report is based and have been relied upon in preparing the report. Copies of the background documents are available up to 4 years after the date of the meeting. If you would like a copy please contact one of the contact officers above.

Previous Reports:

16 January 2023	Agenda Item 5: Dedicated Schools Grant 2023/24
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1. Introduction

- 1.1 The budget 2023/24 presented to School Forum January 2023 included the details of the proposed change to the early years' formula, by including a new quality supplement and that a consultation would be carried out with early years providers.
- 1.2 Manchester has two PFI schools, where buildings for the schools have been procured and facilities managed under the scheme. Payments for PFI arrangements are uplifted year on year in line with inflation, due to the significant increase in the rate of inflation the costs associated with PFI charges have increased more than expected, this was not fully understood at January 2023 Schools Forum, this report provides update on the additional PFI costs.

2. Early years quality supplement consultation responses

- 2.1 The Council opened a consultation with early year settings on 23rd January 2023. The consultation gathered views on the need for a quality supplement, metric to be used to measure it and provided consideration, if a further review is needed for budget setting beyond next year.
- 2.2 New quality supplement and the metric for 2023/24: The reason for the new quality supplement being introduced is driven from the DfE rolling in the teachers' pay grant (TPG), and teachers' pensions employer contribution grant (TPECG) into the early years funding. The TPG and TPECG funding was originally introduced for school settings to support the teachers' pay awards and pension contributions. Therefore, the one-year metric proposed for 2023/24 would ensure this funding reaches providers with higher staffing costs due to teachers pay and conditions regardless of setting type.
- 2.3 To ensure that funding is distributed fairly and in line with need, the Council proposed to undertake a full review to consider a quality supplement, what it should look like and determine the criteria going forward.
- 2.4 A total of 58 responses were gained from the consultation, of the respondents 35 were school-based nurseries (27%) and 23 PVI (19%). Below outlines the consultation questions and the answers provided.

Q1. Do you agree with a Quality Supplement?

From the overall responses 57% of respondents agreed with the introduction of a quality supplement, 33% indicated uncertainty and only 10% opposed the quality supplement. No further comments were made directly to this question. Responses shown on table one below.

Table One: Do you agree with a Quality Supplement

	School-based Nursery		Private Nursery		Total	
		%		%		%
Total Responses:	35	100%	23	100%	58	100%
In favour:	20	57%	13	57%	33	57%
Opposed:	3	9%	3	13%	6	10%
Unsure:	12	34%	7	30%	19	33%

Q2. Do you agree with the proposed metric for 2023 to 2024 funding?

From the overall responses 48% of respondents agreed with the proposed metric for 2023/2024. 40% indicated uncertainty and only 12% opposed the quality supplement.

Table Two: Do you agree with the proposed metric for 2023/24

	School-based Nursery		Private Nursery		Total	
		%		%		%
Total Responses:	35	100%	23	100%	58	100%
In favour:	19	54%	9	39%	28	48%
Opposed:	5	14%	2	9%	7	12%
Unsure:	11	31%	12	52%	23	40%

Further comments:

- Two school-based nurseries raised concerns that the proposed metric would not provide the same level of funding received in previous years. However other school-based nurseries found the funding would equate roughly to that received in previous years.
- Some respondents requested more detail and clarification on the qualifying criteria and application process.
- Concerns were raised that the proposed metric would only benefit school-based nurseries and group nurseries, who can afford teacher led provision and not reach those settings that may need help to raise quality.
- PVI settings shared their frustrations that their skills and contribution to the education system seem to be continuously overlooked, and the difficulties settings face to provide decent pay to early years practitioners.
- Issue was raised with using the label “quality” for the new supplement, as all settings within the sector are expected to provide the same level of care and education. PVI settings do not have additional resources and support school-based nurseries have, such as additional staffing supporting on SEND, safeguarding and family support. This was supported by a headteacher who acknowledged PVI settings struggle to recruit quality staff.

Q3. Do you agree with a review of what a Quality Supplement should look like, including what criteria should be used to determine quality?

71% of respondents agreed with a full review, 24% indicated uncertainty and only 5% opposed the review.

Table Three: Do you agree with a review of what a Quality Supplement

	School-based Nursery		Private Nursery		Total	
		%		%		%
Total Responses:	35	100%	23	100%	58	100%
In favour:	27	77%	14	61%	41	71%
Opposed:	1	3%	2	9%	3	5%
Unsure:	7	20%	7	30%	14	24%

98% of the 28 responses in favour of the one-year proposed funding metric (table two above) was in favour of a full review of the quality supplement for future years.

Further comments were made by respondents regarding how to distribute the rolled in funding:

- All settings with Ofsted ratings of good or above would attract a quality supplement.
- To include settings with other qualified staff such as a graduate leading the provision.
- Rolling into the base rate for all providers

2.5 Informed by consultation responses the Council:

- Has support for the introduction of a quality supplement for early years settings.
- Agreement for the quality metric 2023/24 to be based on early year's provision being led by a qualified teacher (hence incurring additional costs due to teachers pay and conditions).
- Confirms a review of the early year's formula will be undertaken next year in preparation for 2024/25 budget setting.

3. Schools Block: Inflation Impact on Private Finance Initiative (PFI)

3.1 Manchester's school block funding 2023/24 is £504.27m, of which over 99% is passed onto schools. Individual schools funding is based on pupil numbers and their characteristics, such as whether pupils are eligible for free school meals plus premises related characteristics. Pupil related and other funding within most of the local formula allocation has been increased by 3.25%, the only significant change is the funding allocated to schools that are subject to Private Finance Initiative (PFI).

3.2 Manchester has two PFI schools, where buildings for the schools have been procured and facilities managed under the scheme. Under the scheme, responsibility for building and managing infrastructures and services has transferred to a private consortium, including banks, financiers, and a

construction company. Payments for the building and facilities are uplifted year on year in line with inflation, due to the significant increase in the rate of inflation the costs associated with PFI charges have increased more than expected, the overall impact of this is £331k on the schools funding block. This does not impact on schools' allocation based on the local funding formula as agreed at School Forum January 2023.

- 3.3 By including the increase in 2023/24 additional grant will be received 2024/25 onwards. The Council could not foresee the impact of inflation in time for 2023/24 budget setting at Local Authority level and has funded the increased additional costs from the Growth Fund.

4. **Conclusion and Recommendations**

Schools Forum Members are asked to provide a view and comment on:

- The outcome of the early years' consultation on the new quality supplement to the 3-and 4-year-old funding formula for 2023/24
- A review on the early years' quality supplement, including what/if criteria should be used to determine quality from April 2024.
- Schools block funding allocation relating to impact of inflation on the two PFI schools.

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**Manchester City Council
Report for Resolution**

Report to: Schools Forum

Subject: Dedicated Schools Grant (DSG) and School Balances 2022/23 – Outturn Report

Report of: Directorate Finance Lead – Children’s and Schools

Summary

The provisional outturn for Manchester maintained schools is an overall surplus of **£16.180m**, which is a decrease of **£3.324m** (of which c.£320k relates to two schools that have since academised) in the total Schools Balances (Revenue & Capital) held compared to 2021/22. The final position on the centrally retained element of the Dedicated Schools Grant (DSG) is **£1.417m deficit**.

This report summarises the:

- Outturn position on school balances as at 31 March 2023.
- Final outturn position on the centrally retained DSG.

Recommendations

All Schools Forum members are asked to note and comment on:

- Maintained school balances, £16.180m as at 2022/23.
 - The cumulative centrally retained DSG deficit balance £1.417m carried forward into 2023/24.
 - Update on the high needs block (NHB) recovery plan, and a detailed report to be presented to School Forum July 2023.
-

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Background documents (available for public inspection):

The following documents disclose important facts on which the report is based and have been relied upon in preparing the report. Copies of the background documents are available up to 4 years after the date of the meeting. If you would like a copy, please contact one of the contact officers above.

Supporting Reports:

17 th January 2022	School Forum Agenda Item 5: Dedicated Schools Grant 2022/23
19 th September 2022	School Forum Agenda Item 4: High Needs Block Recovery Plan
16 th January 2023	School Forum Agenda Item 5: Dedicated Schools Grant 2023/24

1. Introduction

1.1 The purpose of this report is to state and explain the provisional position of the 2022/23 Dedicated Schools Grant (DSG) in respect of schools and the Council. The final position will be confirmed once the Council's audited accounts have been completed. The 2022/23 DSG allocation after recouplement for academies and high needs was **£343.93m**, of which **£323.81m** (94%) was delegated to schools, **£18.77m** (6%) was retained centrally by the Council and **£1.350m** earmarked towards DSG recovery.

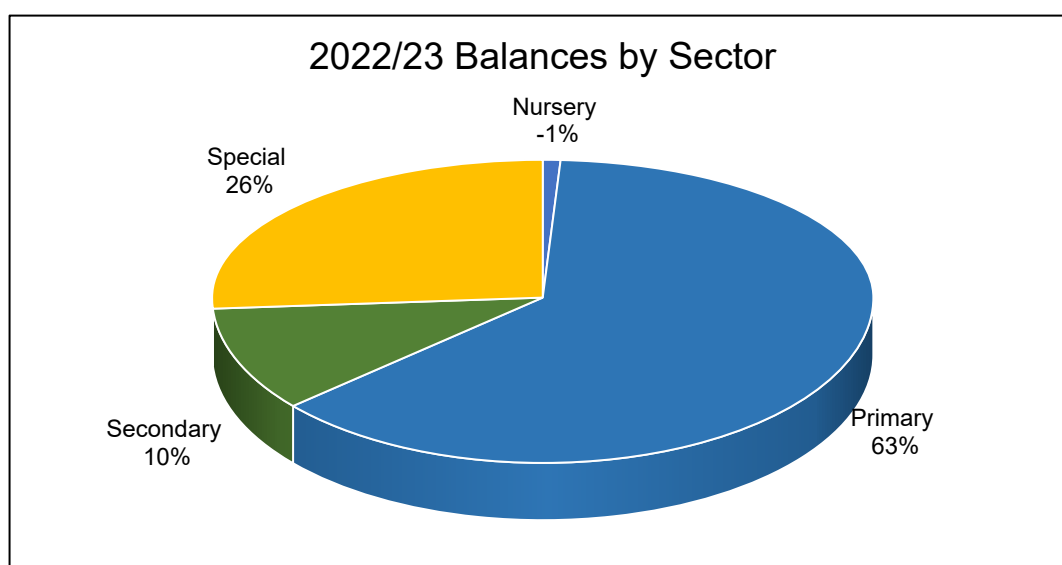
2. Provisional Outturn Position for Schools

- 2.1 The provisional outturn position for maintained schools is an overall surplus of **£16.180m**, a decrease of **£3.324m** in the total balances held compared to 2021/22 (of which c.£320k relates to two schools that have since academised). At period 9 December 2022, schools projected 2022/23 outturn with an overall surplus position of £10.489m. The actual current position of £16.180m is 54% better than that estimate.
- 2.2 Nursery balances have dropped significantly by 199%, primary and secondary balances have dropped by 22% and 12.7% respectively, compared to 2021/22 balances. Conversely special school balances have increased by 6.7%. There have been two primary schools: Lilly Lane and St Kentigerns which converted to academy status in 2022/23, reducing primary school balances by c.£320k.
- 2.3 Table one below displays total schools' balances by sector. Key movements since last financial year 2021/22, are:
- Primary sector balances have decreased by £3.234m. The largest decrease was £206k and conversely the highest increase was £94k.
 - Special school's balances have increased by £247k. Special schools increase is accounted for by six out of the twelve special schools, of which one of the six special schools has seen increase of £0.625m since 2021/22.
 - Three of the five secondary school balance's increased since last financial year, of which £82k was the highest increase.
- 2.4 Tables two and three below, provide a breakdown of maintained schools' total balances (as shown in table one), by surplus and deficit balances respectively. There has been no change in the actual number of nursery, secondary, or special schools in surplus and deficit. There has been an increase of one primary school in deficit, after taking account of the two academisations in this sector.
- 2.5 Schools' deficit balances have increased by £363k since last financial year, as shown in table three, due to movement within the primary and nursery sector. Appendix one provides individual school revenue and capital balances (excludes capital balances for voluntary aided schools)

Table one: Total Balances for Maintained Schools

Sector	2022/23		2021/22		Variance	
	No.	£000's	No.	£000's	No.	£000's
Nursery	2	-171	2	-57	0	-114
Primary	89	10,341	91	13,575	-2	-3,234
Secondary	5	1,703	5	1,950	0	-247
Special	12	4,307	12	4,036	0	271
Total	108	16,180	110	19,504	-2	-3,324

- 2.6 Of the total balances held by schools in 2022/23, 63% of the balances are held across the 89 primary schools, 26% held by 12 special schools, and 10% by 5 secondary schools. (Nursery balances are a net deficit of £171k.) The pie chart below shows a visual depiction of this data.



- 2.7 This means that on average (not actual):
- Nursery school is £57k deficit.
 - primary school balance is £116k surplus
 - secondary school balance is £341k surplus
 - special school balance is £359k surplus

Table two: Surplus Balances for Maintained Schools

Sector	2022/23		2021/22		Variance	
	No.	£000's	No.	£000's	No.	£000's
Nursery	1	4	1	22		(18)
Primary	86	11,232	89	14,199	(3)	(2,967)
Secondary	5	1,702	5	1,950		(248)
Special	12	4,307	12	4,036		271
Total	104	17,245	107	20,206	(3)	(2,961)

Table three: Deficit Balances for Maintained Schools

Sector	2022/23		2021/22		Variance	
	No.	£000's	No.	£000's	No.	£000's
Nursery	1	(175)	1	(79)	0	(96)
Primary	3	(891)	2	(624)	1	(267)
Secondary	0		0		0	
Special	0		0		0	
Total	4	(1,066)	3	(703)	1	(363)

- 2.7 Out of the 104 schools with surplus balances there are twelve primary, two special schools and one nursery school that have balances below £50k, and there are five schools with balances in excess of £400k, two secondary and three special schools. Table four below outlines these five schools, with the highest surplus balances 2022/23
- 2.8 The annual analysis of reserves review will be completed for each maintained school that has an excessive revenue balance, identifying the planned use of the excessive reserves. Schools' balances are deemed excessive if the surplus is higher than the allowable balance, whereby the allowable balance is deemed to be 8% of the budget share for nursery, primary and special schools, and 5% of the budget share for secondary schools. There are twenty-seven schools that need to complete an analysis of reserves, a detailed analysis will be reported to School Forum July 2023.

Table four: Highest Surplus balances - above £400k

Sector	2022/23 Balance £000's
Special	1,167
Special	557
Special	533
Secondary	512
Secondary	410

- 2.9 Table five outlines the range of 2022/23 school balances reported across each sector. The special and secondary school sectors have significantly higher balances when compared to nursery and primary sectors.

Table five: Range of school balances 2022/23

Sector	2022/23	
	£000's	£000's
	From	To
Nursery	(175)	4
Primary	(674)	383
Secondary	121	512
Special	30	1,168

- 2.10 Whilst Appendix one provides 2022/23 individual school revenue and capital balances for Manchester maintained schools, balances for academy schools, as well as useful benchmarking data, can be found published on the links below:
- [Report / summary position covering 2020/21 academic year](#) (Sept 20 – Aug 21). Currently the publication date for academic year 2021/22 has not been published.
 - [Benchmarking data for LA maintained schools and academies.](#)

3. **2022/23 Dedicated School Grant (DSG) Position (deficit)**

- 3.1 The 2022/23 in-year outturn position for the overall retained schools DSG budget is an **underspend** of **£1.092m**, reducing the cumulative DSG position to an overspend of **£1.417m**. The Council's expenditure on schools is funded primarily by grant monies provided by the DfE in the DSG. An element of DSG is recouped by the DfE to fund academy schools in Manchester. DSG is ring-fenced and can only be applied to meet expenditure properly included in the schools budget as defined in the Schools Finance (England) Regulations 2020. The schools budget includes elements for a range of educational services provided on an authority-wide basis and for the individual school's budget, which is divided into a budget share for each maintained school.
- 3.2 High needs block (HNB) 2022/23 overspend of £2.141m, along with a £46k overspend on the central services block, have been offset by underspends in the schools' block and early years block of £1.803m and £1.537m respectively. Resulting in an in-year DSG surplus of £1.091m.

Table six: 2021/22 Summary of DSG Position

Dedicated School Grant (DSG) 2021/22	
	Over/(under) spend to budget £000's
Early Years Block	(1,537)
Schools Block	(1,803)
High Needs Block	2,141
Central Block	108
In-Year Underspend	(1,091)
Deficit b/fwd from 2021/22 (less school clawback)	2,509
Cumulative deficit	1,417

- 3.3 Early years block funding is based on estimated pupil numbers and an adjustment to funding is made by the DfE in July to reflect any increases/decreases between January censuses (i.e., January 2022 and January 2023). The LA has included approximated accruals for the expected adjustments to the allocation based on the January 2023 census data.

3.4 DSG carry forward from 2021/221 totalled £2.702m deficit. This position has been reduced by £193k, by the clawback of school's excess balances held for five years and the DSG in-year surplus position. As shown in Table six above, a reduction in the cumulative DSG deficit to £1.417m to carry forward into 2023/24. The increased growth within the HNB giving an in-year overspend of £2.141m, means recovery and managing demand is a high priority for 2023/24.

4. High Needs Block (HNB) Recovery

4.1 The Council has developed a HNB block recovery plan (reported in September 2022 and January 2023 School Forum). The steering group, who have oversight of the delivery of this plan and associated risks, comprises of officers from education, finance, commissioning, and Schools Forum representatives.

4.2 The 2022/23 original plan was to reduce the DSG deficit by £1.350m from recovery within the HNB, although DSG deficit has reduced it is due to the early years and schools' block. The structural deficit within the HNB, has been caused primarily due to exponential growth within the Education, Health, & Care Plans (EHCP), Post-16, independent sector placements and inter authority recoupment. In 2022/23 these four areas overspent by £5.281m. Work done through the recovery group offset £3.140m of the pressure taking actual HNB overspend to the £2.141m. This pressure has been recognised on a national level, and forms part of the governments SEND review. Table 7 advises potential pressures in these four areas if demand increases at a similar level to 2022/23 in 2023/34 and no recovery savings are made.

Table 7 Overspend in HNB 2022/23 and Projected Overspend 2023/24

Four Main Areas of Overspend	2022/23 Spend	2022/23 Overspend	% Incr. 2021/22 to 2022/23	2023/24 Budget	% Budget Incr. 2023/24 to 2022/23	2023/24 Projection (Based on incr.2022/23)	2023/24 Shortfall (If same levels of incr.)
	£'000	£'000		£'000		£'000	£'000
EHCP	17,404	1,074	27%	20,094	23%	22,116	2,022
Post 16	12,609	2,068	21%	14,629	39%	15,205	576
Education ISP	12,119	1,545	19%	12163	15%	14,456	2,293
Inter Authority	3,012	594	15%	2,666	10%	3,465	799
Total	45,144	5,281	22%	49,552	24%	55,242	5,690

4.3 The work required to secure a balanced budget and particularly to reduce the sharp increase in EHCP, continues to grow. Work to strengthen SEN support and prevention of needs escalating will need time to develop and embed before the desired impact on EHCP requests. The steering group is working on a detailed DSG management plan and strategies to aid with HNB recovery and will bring an update to Schools Forum July 2023.

5. **Recommendations**

All Schools Forum members are asked to note and comment on:

- Maintained school balances, £16.180m as at 2022/23.
- The cumulative centrally retained DSG deficit balance £1.417m carried forward into 2023/24.
- Update on the high needs block (NHB) recovery plan, and a detailed report to be presented to School Forum July 2023.

Appendix One: Individual School's Revenue & Capital Balances as at 31st March 2023

DfE No	Type	School	Schools Balances as at 31 March 2023		
			REVENUE	CAPITAL	TOTAL
			£	£	£
Nursery					
1008	CY	Collyhurst Nursery	-190,910	15,469	-175,440
1007	CY	Martenscroft Nursery	4,361	0	4,361
2		Nursery Total	-186,548	15,469	-171,079
Primary					
2001	CY	Abbott	44,139	17,7301	61,870
2048	CY	Acacias	93,462	19,103	112,565
3301	VA	All Saints (Newton Heath)	121,956	0	121,956
2321	CY	All Saints (Gorton)	85,421	20,913	106,334
2006	CY	Alma Park	219,618	28,346	247,965
3043	VC	Armitage	164,434	8,006	172,440
2010	CY	Ashbury Meadow	221,114	4,500	225,614
2326	Foundation	Baguley Hall	267,315	11,073	278,388
2341	Foundation	Benchill	210,839	21,162	232,001
2328	CY	Birchfields	226,257	29,619	255,876
2039	CY	Bowker Vale	7,063.97	535	7,599
2298	CY	Broad Oak	-691,621	17,744	-673,876
2340	CY	Button Lane	191,101	21,330	212,431
2057	CY	Cavendish	67,177	23,024	90,201
2058	CY	Chapel Street	347,244	35,739	382,984
2060	CY	Charlestown	80,905	20,369	101,274
2288	VC	Cheetwood	14,437	7,188	21,625
3003	VC	Chorlton	62,690	14,599	77,288
3402	VA	Christ the King	90,944	0	90,944
2068	CY	Claremont	177,891	24,738	202,629
3490	VA	CofE The Resurrection	61,403	0	61,403
2296	CY	Crab Lane	189,217	21,451	210,668
2075	CY	Crosslee	112,131	38,888	151,019
2076	CY	Crowcroft Park	109,558	14,505	124,064
2327	CY	Crumpsall Lane	118,783	8,136	126,919
2129	CY	Heald Place	261,829	0	261,829
2303	CY	Higher Openshaw	188,014	5,515	193,529
3408	VA	Holy Name	16,341	0	16,341
3005	VC	Holy Trinity	206,357	9,472	215,829
2249	CY	Irk Valley	19,097	18,807	37,904
2305	CY	Manley Park	159,952	0	159,952
2161	CY	Mauldeth Road	201,658	19,947	221,605

DfE No	Type	School	Schools Balances as at 31 March 2023		
			REVENUE	CAPITAL	TOTAL
			£	£	£
2324	CY	Medlock	180,2878	23,432	203,720
2164	CY	Moston Fields	-189,535	5,998	-183,536
2165	CY	Moston Lane	248,063	18,675	266,738
2184	CY	New Moston	96,730	26,251	122,981
2186	CY	Northenden	78,178	31,247	109,426
2330	CY	Oswald Road	114,300	24,459	138,760
3475	VA	Our Lady's	78,394	0	78,394
3506	CY	Park View	8,284	27,333	35,618
2300	CY	Peel Hall	91,794	14,664	106,458
2302	CY	Pike Fold	223,960	33,622	257,582
2216	CY	Plymouth Grove	66,307	24,711	91,018
2232	CY	Rack House	159,119	18,472	177,591
2234	CY	Ravensbury	192,939	0	192,939
2008	CY	Ringway	76,412	22,406	98,818
3464	VA	Sacred Heart (Baguley)	70,187	0	70,187
3505	VA	Sacred Heart (Gorton)	101,952	0	101,952
2301	CY	Sandilands	78,248	41,769	120,017
3491	VA	Saviour	65,707	0	65,707
3041	VC	St Agnes	8,731	30,574	39,305
3415	VA	St Aidan's Catholic	66,186	0	66,186
3418	VA	St Ambrose	105,091	0	105,091
3310	VA	St Andrew's	5,095	0	5,095
3504	VA	St Anne's (Ancoats)	99,193	0	99,193
3422	VA	St Anne's (Crumpsall)	163,139	0	163,139
3011	VC	St Augustine's	227,416	20,654	248,070
3473	VA	St Bernard's	181,852	0	181,852
3429	VA	St Brigid's	111,623	0	111,623
3432	VA	St Catherine's	115,859	0	115,859
3015	VC	St Chrysostom's	102,489	32,777	135,266
3501	VA	St Clare's	135,082	0	135,082
3042	VC	St Clement's	78,608	17,342	95,950
3500	VA	St Cuthbert's	104,789	0	104,789
3439	VA	St Dunstan's	99,708	0	99,708
3440	VA	St Edmund's	153,290	0	153,290
3445	VA	St Francis	-33,433	0	-33,433
3316	VA	St James' (Rusholme)	31,518	0	31,518
3446	VA	St John Bosco	76,875	98	76,973
3045	VC	St John's (Longsight)	176,755	37,615	214,370
3489	VA	St John's (Chorlton)	127,007	0	127,007
3494	VA	St Joseph's	63,991	0	63,991

DfE No	Type	School	Schools Balances as at 31 March 2023		
			REVENUE	CAPITAL	TOTAL
			£	£	£
3044	VC	St Luke's	16,905	9,567	26,472
3452	VA	St Malachy's	87,013	0	87,013
3455	VA	St Margaret Mary's	97,004	0	97,004
3022	VC	St Margaret's	109,223	7,306	116,529
3028	VC	St Mary's (Moss Side)	143,049	18,908	161,957
3484	VA	St Mary's (Moston)	36,702	0	36,702
3457	VA	St Mary's (Levenshulme)	121,398	6,289	127,688
3460	VA	St Patrick's	138,379	0	138,379
3039	VC	St Paul's Primary	135,207	34,806	170,013
3465	VA	St Peter's Catholic	21,242	0	21,242
3325	VA	St Philip's	205,150	0	205,150
3482	VA	St Richard's	13,378	23,757	37,135
3034	VC	St Wilfrid's (Newton Heath)	133,963	17,967	151,930
3469	VA	St Wilfrid's (Hulme)	73,004	0	73,004
3472	VA	St Willibrord's	57,747	0	57,747
3507	VA	The Divine Mercy	25,080	33,200	58,280
2278	CY	Varna Street	246,057	25,351	271,408
89		Total	9,249,425	1,091,696	10,341,121
Secondary					
4271	CY	Abraham Moss High	472,825	39,195	512,019
4753	VA	Loreto High	121,235	0	121,235
4761	VA	Our Lady's High	292,042	58,086	350,128
4770	VA	St Peter's High	410,334	0	410,334
4768	VA	The Barlow High	280,100	29,066	309,167
5		Secondary Total	1,576,537	126,346	1,702,883
Special					
7749	CY	Ashgate	12,374	17,987	30,360
7023	CY	Camberwell Park	246,589	90,698	337,287
7029	CY	Lancastrian	355,450	13,301	368,751
7007	CY	Manchester Hospital	514,332	19,580	533,911
7042	CY	Meade Hill	164,183	2,256	166,439
7061	CY	North Ridge High	209,486	32,769	242,255
7047	CY	Rodney House	239,833	8,499	248,332
7056	CY	Southern Cross	557,068	0	557,068
7041	CY	The Birches	7,748	24,921	32,669
7959	CY	Castlefield Campus	381,524	3,005	384,529
1102	CY	Bridglea PRU	218,919	19,025	237,945
1105	CY	Secondary PRU	1,163,778	3,782	1,167,560
12		Special Total	4,071,283	235,822	4,307,105
108		Total All School	14,710,697	1,469,333	16,180,030

Manchester City Council Report for Resolution

Report to: Schools Forum

Subject: Outcome of the National Funding Formula (NFF) Consultation:
Implementing the Direct NFF

Report of: Directorate Finance Lead – Schools and Education

Summary

Department for Education (DfE) in June 2022 launched the second stage of the National Funding Formula (NFF) consultation - Implementing the direct NFF, as reported to School Forum July 2022. The direct NFF is developing a single national funding formula system to direct funds to schools, moving away from local funding formulas (LFF) for primary and secondary schools to a direct formula from the DfE. This consultation looked at some of the more technical aspects of how the direct NFF can be implemented .

The consultation closed 9th September 2022, the government's response: Implementing the Direct NFF was published April 2023. This report looks at the outcome and the next steps toward the direct NFF. There are changes that will be implemented from 2024/25, regarding growth fund and split sites and longer-term changes to be phased in leading to the full implementation of the direct NFF.

Recommendations

School Forum members are asked to note and comment on:

The [government's response: Implementing the Direct NFF](#) published April 2023, and the next steps toward the direct NFF.

In the short-term local impact will be:

- Changes to the way growth fund is allocated to schools that are growing.
- Consideration will need to be given to whether there is need to develop a local falling rolls fund.
- Change to split site criteria is not expected to adversely impact the four Manchester split site schools.

In the longer-term, the reforms planned are:

- Transfer of Funding to High Needs Block (HNB), local authorities will need Secretary of State approval.
 - Indicative SEND budget to be set nationally.
 - Exceptional circumstances criteria to be limited to certain categories.
 - Minimum Funding Guarantee (MFG) to be simplified to a pure pupil-led per pupil.
 - Providing funding information to schools, by developing a calculator tool.
-

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Background documents (available for public inspection):

The following documents disclose important facts on which the report is based and have been relied upon in preparing the report. Copies of the background documents are available up to 4 years after the date of the meeting. If you would like a copy, please contact one of the contact officers above.

Supporting Reports:

20 th September 2021	School Forum Agenda Item 5: National Funding Formula (NFF) Consultation
15 th November 2021	School Forum Agenda Item 7: Schools Consultation Outcome for NFF Transition
20 th June 2022	School Forum Agenda Item 7: Outcome of the National Funding (NFF) Formula Consultation
18 th July 2022	School Forum Agenda Item 5: National Funding Formula (NFF) Consultation: Implementing the Direct NFF

1. Introduction

- 1.1 Mainstream schools funding is allocated to local authorities on a national formula basis, once the grant is received, local authorities can calculate funding for schools based on their local funding formulae (LFF). Flexibility within the LFF has reduced over the past years, the end point being where every mainstream school in England is funded through a single national formula. There is no fixed target date by which the direct National Funding Formula (NFF) will be fully in place, instead there is a transition phase moving local authorities LFF progressively closer towards the NFF. The first year of formal transition was 2023/24, where LFF factor values had to move at least 10% closer to the NFF values. Manchester started this process in 2022/23.
- 1.2 The DfE consultation launched 7th June 2022: Implementing the Direct NFF, covered more technical aspects of the transition to the direct NFF (as reported to school forum July 2022). The government consultation closed 9th September 2022, with the government's response: Implementing the Direct NFF published April 2023.
- 1.3 This report looks at the outcome from the consultation, and the next steps towards a direct NFF. Section 2 of the report provides an overview on the changes that will be implemented from 2024/25, namely the:
- Growth fund (further requirements on how local authorities can operate their growth fund)
 - Split site funding (introduction of a national formula for split sites)

The longer-term changes to be phased as there is a move towards the NFF are covered in Section 3 of the report. Appendix one provides a summary of changes.

2. Outcome of NFF Consultation: Changes to be Implemented 2024/25

Growth Fund – Minimum funding criteria

- 2.1 A minimum funding criterion for growing schools will be introduced 2024/25, rather than moving straight to a fully determined national standard rate. This applies where a school have agreed with the LA to host an additional class to meet basic need. Local discretion would remain for the present, including allowing local authorities to retain any unspent growth fund within DSG.
- 2.2 DfE will engage with local authorities and other stakeholders on the design of these new requirements, including minimum funding rates, before publishing final School Operational guide in July 2023.

Growth Fund – Allocation Methodology

- 2.3 Growth fund allocation methodology to local authorities will now be based on growth and falling roll, rather than just growth. Small areas within a local authority area, Medium Super Output Areas (MSOA) will be measured for growth and significant decline in pupil numbers. Those MSOA that have seen

pupil growth, will be allocated funding at the growth rate, where a significant decline in pupil numbers have been observed an allocation at a separate falling rolls rate. There will not be any netting off the funding allocations, so within a local authority area that have both MSOA that experience growth and falling roles, the funding allocation will include both elements.

- 2.4 What constitutes as “significant” for falling roles, as not been defined, DfE will work on this with stakeholders. It is difficult to state how the change in methodology will impact Manchester growth funding, as confirmation of the growth funding factors 2024/25 will not be published until July 2023.

Growth Fund – Falling Rolls

- 2.5 From 2024/25 the removal of the restriction that falling rolls funding can only be provided to schools judged “Good” or “Outstanding” by Ofsted. The falling rolls funding is targeted only at schools where places will be needed in future. Therefore, the removal of Ofsted restriction will be removed, and local authorities are required to use School Capacity Survey (SCAP) data in taking decisions, and only provide funding where SCAP data shows that school places will be required in the subsequent three to five years.

Growth Fund – Repurposing of School Places

- 2.6 Local authorities will have the flexibility (if funding level allows) to use growth and falling roles funding to fund revenue cost associated with repurposing or reducing school places. This could support local authorities repurposing spaces for Special Educational Needs and Disabilities (SEND) or resource units in mainstream schools.

Split Sites Funding Formula

- 2.7 Split sites funding is school-led funding intended to account for additional cost incurred where a school is split over more than one site. Currently this factor is optional for local authorities and the methodology applied varies. Manchester’s LFF includes split site funding for four schools at a flat rate of £45k each. A national formula for split sites will replace the current local authority led approach in 2024/25.
- 2.8 The national formula has a cap, set at 60% of the NFF premises lump sum factor and includes two elements:
- Basic eligibility criteria (40% of NFF lumpsum) road, as a clear marker of separateness, and the second site is primarily for pupils’ education of 5-16years.
 - Distance eligibility criteria (20% of NFF lumpsum) lump sum will be applied where the sites meet a distance threshold. Following responses from the consultation this element has been a tapered for distances between 100m- 500m.
- 2.9 The DfE have increase the weighting for the basic element, due to the consultation responses, this will benefit the four Manchester split sites schools.

As all four qualify for the basic element, and three qualify for the distance funding between 100m -500m. MFG protection will apply to schools losing funding because of the change in formula, although based on the NFF premises lump sum factor 2023/24 this is unlikely for the Manchester split sites schools.

3. **Outcome of NFF Consultation: Longer Term Changes**

Transfer of Funding to High Needs Block (HNB)

- 3.1 Currently local authorities can transfer funding between the blocks of their Dedicated Schools Grant (DSG) allocations. Local authorities can transfer up to 0.5% of their schools' block with the approval of the School's Forum. Any transfers above 0.5%, or where the School Forum does not agree, must be decided by the Secretary of State.
- 3.2 Under the direct NFF government have confirmed that local authorities are allowed to request funding transfers to high needs budgets, and that these requests will be:
- Drawn from a short menu of potential options on how the funding adjustment to mainstream schools should be made. DfE will engage further with local authorities to develop the detail of the criteria.
 - Subject to Secretary of State approval. Local authorities will still need to consult with local stakeholders and include the results of these consultations in their applications. The Secretary of State's decision will then be informed by local feedback.

Indicative Special Education Needs and Disabilities (SEND)

- 3.3 Mainstream school's budget includes a notional SEND budget calculation, which identifies an indicative budget as a guide to the resources that might be needed by a school in supporting its pupils with SEND. Local authorities use various factors within their LFF to identify the notional SEND. There is no national consistency in the formula.
- 3.4 The government has reported that there is a national support for a nationally specified notional/indicative SEND budget formula in mainstream schools. DfE will look at whether to strengthen the 2024/25 guidance to give greater consistency in the calculation. The government proposes to link the national SEND standards being developed under the national SEND and AP improvement plan. There will be further engagement further with the sector to consider the design of the indicative SEND budget in the context of the National Standards as they are developed.

Exceptional Circumstances

- 3.5 The current criteria for exceptional funding, is that the cost of the exceptional spend (additional premises cost most schools do not face) is greater than 1% of the school's budget. Manchester has two high schools that receive exceptional funding. The threshold of 1% will remain for now.

- 3.6 Government will continue to progress plans to reform the exceptional circumstances factor, moving away from a locally led approach to a national application system, in line with NFF objectives. DfE want to get greater clarity around exceptional circumstances, and to restrict the circumstances that are eligible for funding through the factor to a small number of categories.

Minimum Funding Guarantee (MFG)

- 3.7 MFG protects schools from excessive year-on-year losses in per-pupil funding. The MFG under the direct NFF will continue to play a crucial role for ensuring stability for schools, so schools do not see sudden drops in their per pupil funding levels.
- 3.8 MFG under the direct NFF will be simplified to a pure pupil-led per pupil protection, excluding school-led factors such as split sites and exceptional circumstances. DfE cannot confirm future MFG rates at this stage, as the future funding rates will depend on several factors, including the outcome of future spending reviews.

Annual funding cycle – providing information to schools.

- 3.9 Once the direct NFF is in place there will be no requirement for local authorities to complete the Authority Proforma Tool (APT). This tool is used by local authorities in calculating school's budget shares, and under the NFF the formula will be set nationally. Although there will be other data returns required by the DfE from local authorities. DfE are working on developing a calculator tool for schools, that can be used to estimate future funding, providing some form of notional allocation.

4. Conclusion and Recommendations

- 4.1 School Forum members are asked to note and comment on:
The government's response: Implementing the Direct NFF published April 2023, and the next steps toward the direct NFF.

In the short-term local impact will be:

- Changes to the way growth fund is allocated to schools that are growing.
- Consideration will need to be given to whether there is need to develop a local falling rolls fund.
- Change to split site criteria is not expected to adversely impact the four Manchester split site schools.

In the longer-term, the reforms planned are:

- Transfer of Funding to High Needs Block (HNB), Local authorities will need Secretary of State approval.
- Indicative SEND budget to be set nationally.
- Exceptional circumstances criteria to be limited to certain categories.
- Minimum Funding Guarantee (MFG) to be simplified to a pure pupil-led per pupil.
- Providing funding information to schools, by developing a calculator tool.

Appendix One: Summary of the Direct NFF next steps

Next Steps to Direct National Funding Formula (NFF)	2024/252 Change	Future Change
Growth Fund – Minimum funding criteria (Rate and criteria to be finalised)	Y	
Growth Fund – Allocation Methodology (Takes account of growth & falling rolls)	Y	
Growth Fund – Falling Rolls (Removal that school must be “Good” or “Outstanding to be eligible)	Y	
Growth Fund – Repurposing of School Places (Support SEND)	Y	
Split Sites Funding National Formula (Capped at 60% of the NFF lump sum)	Y	
Transfer of Funding to High Needs Block (HNB) (Local authorities will need Sectary of State approval)		Y
Indicative Special Education Needs & Disabilities (SEND) Budget (National formula to be agreed)		Y
Exceptional Circumstances (Restrict the circumstances that are eligible)		Y
Minimum Funding Guarantee (MFG) (Simplified to a pure pupil-led per pupil)		Y
Annual funding cycle – providing information to schools (Developing a calculator tool for schools)		Y

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**Manchester City Council
Report for Resolution**

Report to: Schools Forum
Subject: Forward Plan 2023/24
Report of: Directorate Finance Lead - Children's and Schools

Summary

Forward plan of Schools Forum business for the forthcoming academic year.

Recommendations

Members of Schools Forum are asked to note the report.

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Background documents (available for public inspection):

The following documents disclose important facts on which the report is based and have been relied upon in preparing the report. Copies of the background documents are available up to 4 years after the date of the meeting. If you would like a copy please contact one of the contact officers above.

1. Introduction

- 1.1 The following report provides a forward plan for essential approvals and reports that will be brought to the School Forum by officers throughout the 2023/24 academic year. Further reports will be added to the Forum agenda as and when required.

2. Forward Plan

Meeting	Reports
18 th September 2023	<ul style="list-style-type: none"> ● National Funding Formula updates ● Dedicated Schools Grant monitoring ● Annual Review of Scheme for Financing Schools and School Financial regulations
20 th November 2023	<ul style="list-style-type: none"> ● National Funding Formula updates ● High Needs Block (HNB) Recovery plan update ● De-Delegation 2023/24 ● Benchmarking ● Early Years Supplements review
15 th January 2024	<ul style="list-style-type: none"> ● DSG settlement and budget for forthcoming year
18 th March 2024	<ul style="list-style-type: none"> ● Funding updates
17 th June 2024	<ul style="list-style-type: none"> ● Outturn report – School Balances and centrally retained DSG
15 th July 2024	<ul style="list-style-type: none"> ● National Funding Formula updates ● Review of Analysis of Reserves & Excessive Balances ● HNB Recovery update ● Early Years Block review ● School Forum Forward Plan 2023/24

- 2.1 Updates to schools and early years funding reforms will continue to be provided to Schools Forum as announcements are made.

3. RECOMMENDATIONS

- 3.1 Members of Schools Forum are asked to note the report.