

Report to Schools Forum

Meeting Date	18 January 2024
Subject	School Funding Formula 2024/2025
Report Author	Jane Davy

Report purpose

To inform Schools Forum of the Individual School Budget Shares (ISB) calculated through the funding formula and the final DSG Schools Block allocation.

Need for consideration

Consider the ISB allocations and give a view

Need for decision

Schools Forum is not legally required to make a decision. However, the views of members will be considered to determine the School Funding Formulae for 2023/24

Contact Officers

Jane Davy
Finance Manager
Local Management for Schools Team
Email: jane.davy@calderdale.gov.uk
Tel: 01422 393543

1. Background information and context

In October 2023 Schools Forum was consulted on the proposals for the Funding Formulae for 2024/25.

Members voted unanimously to reject the LA's request to transfer 0.5% from the schools block to the high needs block. LA senior officers and council members agreed to apply to the Secretary of State to disapply the School Forum decision. On Friday 12th January the LA received a letter see, Appendix B, conditionally agreeing to the LA's request.

Following this decision, the LA is proposing to follow the NFF funding factors and values as agreed in principle at the October meeting, with the exception of the Basic Entitlement value, more detail is given below at 2b. Forum members were also in agreement with the disapplication requests for MFG and MFFL adjustment for The Halifax Academy and The Calder Learning Trust.

The Local Authority must submit final allocations to the ESFA for approval no later than the 22 January 2024. Upon ESFA approval the LA will inform maintained mainstream schools of their individual allocations no later than 28 Feb 2024. Academies will receive their allocation from the ESFA based on the local formulae in March 2024.

2. Main issues for Schools Forum

a) Final Schools Block DSG Allocation

The ESFA announced the final allocation on the 19 Dec 2023.

Calderdale have received £192.5m for the schools block, an increase of £8.2m million from 2023/24. When you include the mainstream schools additional grant for 23/24 of £6.2m and the adjustment to pupil numbers -£2.1m for a decrease of 413 pupils (-424 Primary and +11 Secondary) the total increase equates to £4.1m.

Information of DSG allocation is available on the ESFA website, below is an analysis of how the Schools Block is calculated.

	£M
Primary pupils	92.23
Secondary pupils	96.33
Rates	1.89
Split Site	0.31
PFI	1.20
Growth/Falling Rolls	0.56

b) Mainstream Individual School Funding Allocations

Calderdale has £192.4m to allocate through the funding formula, this is after retaining £100K for the growth fund (the amount has been reduced by £13k from what was agreed at the October meeting). No funding is required for falling rolls due to no schools being eligible. With growth fund being agreed in principle It is expected that School Forum members will agree the reduction to Growth Fund when discussing the growth fund paper (agenda item XX)

After running the formula based on the agreed factors and values i.e., the national funding factors and values as set out at October School Forum there is a surplus of £599k. £460k is surplus from growth and falling rolls and £139k from the remaining schools block.

As the Secretary of State has agreed the request to transfer 0.5% which, equates to £962k, to the high needs block, the LA will use the £599k surplus and reduce the funding formula by a further £363k by reducing the basic entitlement values by the following amounts.

KS1 -£12.70

KS2 -£17.85

KS3 -£19.96

All other factors and values will remain at the NFF values.

The NFF factors and values are shown in the table below, MFG will remain at +0.5% and no capping will be applied.

	2023/24		2024/25	
	Primary	Secondary	Primary	Secondary
Basic Entitlement				
KS1&2	3394.54		3,549.92	
KS3		4785.77		5,005
KS4		5,393.86		5,642
Deprivation				
FSM	480.08	480.08	490.08	490.08
FSM6	705.11	1030.16	820.14	1200.20
IDACI A	670.11	930.15	680.12	945.16
IDACI B	510.08	730.12	515.09	740.13
IDACI C	480.07	680.11	485.08	690.12
IDACI D	440.07	620.10	445.08	630.11
IDACI E	280.04	445.07	285.05	450.08
IDACI F	230.04	335.04	235.04	340.06
Attainment	1,155.18	1,750.28	1,170.20	1,775.3
EAL	580.09	1,565.25	590.10	1,585.27
Mobility	945.15	1,360.22	960.16	1,380.23
Lump Sum	128,020.48	128,020.48	134,422.85	134,422.85

The disapplication requests have been approved by the ESFA, after running the formula it was found that only the MFG adjustment for The Halifax Academy needs to be applied to the funding formula.

An impact assessment of the proposed funding formula options is shown at Appendix A

In addition to the DSG Schools Block the government have announced that schools will continue to receive the Teachers Pay Grant for 24/25. Calderdale have been notified of an indicative amount of £3.2m for mainstream schools. The ESFA will publish Individual school allocations in May 2024. There will also be an additional grant for 2024 to 2025 to reflect the additional costs of the increase to the employer contribution rates to the Teachers Pensions' Scheme from April 2024. Further details will be announced in due course.

The additional funding will be incorporated into the schools national funding formula (NFF) for 2025 to 2026.

Finally, there will be an increase in the Pupil Premium rates from April 24 as detailed below.

Primary FMS6 pupils £1,480

Secondary FMS6 pupils £1,050

Looked after Children £2,570

Service pupils £340

Children who have ceased to be looked after £2,570

3. Recommendations

- a) To give a view on the Schools Block allocation for 2024/25
- b) To note the additional grants and the increase to Pupil Premium

4. Impact of funding, targets and milestones

See Appendix A

5. Resource implications

The total Schools Block DSG allocation of £192.4m will be allocated to schools through the Funding Formulae, Growth Fund and the 0.5% transfer to High Needs Block.

6. Appendices

	2023/24		2024/25			
School Name	Pupil Numbers	Funding Formula	Pupil Numbers	Pupil Number inc/dec	Funding Formula	difference in funding increase/decrease
Abbey Park Academy	197	1,059,864	187.00	-10	1,073,594	13,730
All Saints' CofE Primary School	212	937,253	211.00	-1	976,103	38,850
Ash Green Community Primary School	404	2,290,166	411.00	7	2,538,558	248,392
Bailiffe Bridge Junior and Infant School	198	916,013	192.00	-6	926,324	10,311
Barkisland CofE VA Primary School	194	857,782	191.00	-3	883,722	25,940
Beech Hill School	461	2,519,039	461.00	0	2,608,513	89,474
Bolton Brow Primary Academy	210	964,673	211.00	1	1,014,435	49,762
Bowling Green Academy	145	708,894	151.00	6	772,818	63,924
Bradshaw Primary School	331	1,463,363	326.00	-5	1,513,263	49,900
Brighouse High School	1032	6,288,431	1,042.00	10	6,627,523	339,092
Burnley Road Academy	180	880,550	171.00	-9	901,572	21,022
Carr Green Primary School	312	1,446,744	308.00	-4	1,484,968	38,225
Castle Hill Primary School	182	882,777	168.00	-14	872,163	-10,614
Central Street Infant and Nursery School	59	377,598	72.00	13	456,610	79,012
Christ Church CofE VA Junior School, Sowerby Bridge	110	618,570	93.00	-17	565,066	-53,503
Christ Church Pellon CofE VC Primary School	168	978,173	167.00	-1	1,056,025	77,853
Cliffe Hill Community Primary School	169	953,540	161.00	-8	953,083	-457
Colden Junior and Infant School	77	477,747	74.00	-3	482,507	4,759
Copley Primary School	289	1,310,211	302.00	13	1,429,386	119,175
Cornholme Junior, Infant and Nursery School	148	832,175	143.00	-5	852,301	20,127
Cross Lane Primary and Nursery School	305	1,546,479	300.00	-5	1,591,947	45,469
Dean Field Community Primary School	199	1,116,123	201.00	2	1,171,964	55,841
Elland Church of England (Voluntary Aided) Junior, Infant and Nursery School	160	974,185	142.00	-18	942,811	-31,374
Ferney Lee Primary School	181	1,021,429	186.00	5	1,083,747	62,319

Field Lane Primary School	99	631,298	86.00	-13	589,000	-42,298
Hebden Royd CofE VA Primary School	92	479,434	96.00	4	525,677	46,243
Heptonstall Junior Infant and Nursery School	67	396,781	50.00	-17	349,587	-47,194
Holy Trinity Primary School, A Church of England Academy	351	1,710,417	372.00	21	1,906,461	196,044
Holywell Green Primary School	166	835,877	157.00	-9	836,252	375
Lee Mount Primary School	307	1,661,046	288.00	-19	1,642,340	-18,706
Lightcliffe Academy	977	6,245,499	932.00	-45	6,389,827	144,328
Lightcliffe C of E Primary School	414	1,829,097	412.00	-2	1,905,771	76,674
Ling Bob Junior, Infant and Nursery School	306	1,695,584	294.00	-12	1,699,141	3,558
Longroyde Primary School	374	1,707,755	357.00	-17	1,792,327	84,572
Luddenden CofE School	100	594,010	93.00	-7	607,037	13,027
Luddendenfoot Academy	191	850,535	193.00	2	903,828	53,293
Midgley School	95	509,297	71.00	-24	431,877	-77,420
Moorside Community Primary School	207	1,207,198	210.00	3	1,282,776	75,578
Mount Pellon Primary Academy	294	1,599,347	269.00	-25	1,534,382	-64,965
New Road Primary School	162	860,271	174.00	12	959,374	99,103
Norland CE School	76	432,050	75.00	-1	455,280	23,230
Northowram Primary School	405	1,821,401	416.00	11	1,955,136	133,735
Old Earth Primary School	412	1,840,501	420.00	8	1,953,176	112,675
Old Town Primary School	71	403,702	78.00	7	446,624	42,922
Park Lane Academy	449	3,499,573	425.00	-24	3,494,396	-5,177
Parkinson Lane Community Primary School	524	2,793,036	499.00	-25	2,760,473	-32,563
Rastrick High School	1743	10,437,870	1,787.00	44	11,266,443	828,572
Ripponden Junior and Infant School	195	922,628	182.00	-13	903,634	-18,994
Riverside Junior School	143	700,592	126.00	-17	659,511	-41,081
Ryburn Valley High School	1383	8,608,235	1,391.00	8	9,082,229	473,993
Sacred Heart Catholic Voluntary Academy	192	985,916	180.00	-12	976,622	-9,294
Salterhebble Junior and Infant School	209	1,002,101	204.00	-5	1,024,754	22,653
Salterlee Primary School	101	501,353	93.00	-8	496,491	-4,862
Savile Park Primary School	364	2,293,878	370.00	6	2,398,033	104,155
Scout Road Academy	100	506,551	99.00	-1	528,242	21,691

Shade Primary School	178	854,222	158.00	-20	825,496	-28,726
Shelf Junior and Infant School	257	1,148,583	239.00	-18	1,130,664	-17,920
Siddal Primary School	183	983,308	170.00	-13	979,160	-4,148
St Andrew's Church of England (VA) Infant School	166	834,599	162.00	-4	850,097	15,498
St Andrew's CofE (VA) Junior School	208	1,019,293	221.00	13	1,128,585	109,293
St Augustine's CofE School	146	888,742	159.00	13	1,063,797	175,055
St John's (CofE) Primary Academy, Clifton	208	933,789	204.00	-4	963,188	29,399
St John's Primary School In Rishworth	144	664,402	145.00	1	697,483	33,081
St Joseph's Catholic Primary Academy	164	808,368	150.00	-14	818,676	10,309
St Joseph's Catholic Primary Academy	195	920,900	194.00	-1	962,378	41,478
St Joseph's Roman Catholic Voluntary Academy	122	712,708	109.00	-13	678,724	-33,984
St Malachy's Catholic Primary School, A Voluntary Academy	148	912,974	150.00	2	960,574	47,601
St Mary's Catholic Primary Academy	303	1,533,310	303.00	0	1,590,584	57,274
St Mary's CofE (VC) J and I School	98	507,834	87.00	-11	486,455	-21,380
St Michael and All Angels CofE Primary & Pre School	188	877,778	181.00	-7	897,924	20,147
St Patrick's Catholic Primary Academy	101	558,418	95.00	-6	565,254	6,836
Stubbings Infant School	33	256,313	41.00	8	301,118	44,804
The Brooksbank School	1419	8,744,925	1,400.00	-19	9,085,320	340,395
The Calder Learning Trust	1370	8,218,402	1,345.00	-25	8,433,025	214,623
The Crossley Heath School	903	5,182,866	900.00	-3	5,424,361	241,495
The Greetland Academy	410	1,837,619	398.00	-12	1,922,178	84,559
The Halifax Academy	1438	9,591,213	1,437.00	-1	9,948,521	357,309
The North Halifax Grammar School	899	5,163,180	902.00	3	5,440,543	277,363
Todmorden CofE J, I & N School	204	1,021,993	200.00	-4	1,051,301	29,308
Todmorden High School	891	5,722,976	875.00	-16	5,883,433	160,458
Triangle CofE VC Primary School	191	908,445	186.00	-5	922,845	14,400
Trinity Academy Akroydon	289	1,469,323	257.00	-32	1,394,388	-74,934
Trinity Academy Grammar	931	6,772,976	999.00	68	7,565,238	792,262
Trinity Academy Halifax	1605	10,648,015	1,616.00	11	11,210,007	561,991
Trinity Academy St Chad's	151	698,072	141.00	-10	705,782	7,710
Trinity Academy St Peter's	106	637,129	104.00	-2	660,133	23,004

Tuel Lane Infant School	64	408,694	57.00	-7	411,353	2,659
Wainstalls School	203	899,201	199.00	-4	940,947	41,746
Walsden St Peter's CE (VC) Primary School	172	826,115	174.00	2	865,213	39,097
Warley Road Primary Academy	451	2,316,835	441.00	-10	2,353,104	36,269
Warley Town School	140	687,641	134.00	-6	704,653	17,012
West Vale Academy	123	680,321	101.00	-22	618,588	-61,732
Whitehill Community Academy	628	2,912,355	617.00	-11	3,030,733	118,378
Withinfields Primary School	313	1,470,506	301.00	-12	1,503,847	33,340
Woodhouse Primary School	418	1,875,177	418.00	0	1,960,867	85,690
Total	32,653	184,094,131	32,240	-413	191,472,247	7,378,116

Tel: 0370 000 2288

www.education.gov.uk/efa-enquiry-form

12 January 2024

By email: [REDACTED]@Calderdale.gov.uk

Dear [REDACTED]

Request to disapply the Dedicated Schools Grant (DSG) conditions of grant

Thank you for your request to move 0.5% from your schools block to your high needs block.

We have assessed your application and supporting evidence against the criteria set out in the schools operational guide: 2024 to 2025 to inform this decision. Based on the information supplied, and after careful consideration, the minister has agreed to **conditionally approve** your request for the financial year 2024 to 2025.

Conditions for approval:

- work with ESFA to develop and strengthen its management plan, which must be submitted on the ESFA template and include EHCP forecasts, costs and mitigations, including costed savings. This management plan must be shared with schools forum and relevant minutes provided to the ESFA
- meet with ESFA at least twice in 2024-25 to discuss DSG management
- itemise the spend for the block transfer request for 2024 to 2025, explaining how this will improve outcomes and/or develop longer term high needs sustainability
- demonstrate that the block transfer will be spent on DSG allowable items.

Failure to adhere to these conditions will be taken into consideration when assessing any future requests.

If you are content to accept these conditions or have any questions, please let us know at LA.Disapplications@education.gov.uk by Tuesday 16 January.

Yours sincerely



Christina Choi,
Head of the Funding Policy Implementation Unit