

Cheshire West & Chester Council

## **Cheshire West and Chester Schools Forum**

Tuesday 16 January 2024  
4.30pm – 6.30 pm

Virtual Meeting

Schools Forum Clerk  
Children and Families  
Cheshire West and Chester Council  
Telephone 07584 206913



## **Notes for members of the public**

### **Cheshire West and Chester Schools Forum**

The Council welcomes and encourages you to be at its meetings and Committees.

You are requested to remain quiet whilst the meeting is taking place.

The agenda is sometimes divided into two parts. You are allowed to stay for the first part. When the Forum is ready to deal with the second part you will need to leave the meeting because the business will be of a confidential nature, for example, dealing with individual people, contracts and financial affairs of other parties.

Members of the public wishing to attend Schools Forum meetings should contact the Schools Forum Clerk:

Email: [school.relationshipteam@cheshirewestandchester.gov.uk](mailto:school.relationshipteam@cheshirewestandchester.gov.uk)

Telephone: 07584 206913

## Agenda for Cheshire West and Chester Schools Forum 16 January 2024

|     |        |   |                 |                  |
|-----|--------|---|-----------------|------------------|
| 1.  | 4.30   | Introductions and apologies   |                 |                  |
| 2.  | 4.35   | Minutes and matters arising of last meeting<br>2.1 To agree the minutes held 10 October 2023<br>2.2 Matters arising |                 | Page 4-9         |
| 3.  | 4.45   | Dedicated Schools Grant (DSG) 2023-24 Forecast<br>Outturn at Third Review   | Lynsey Taylor   | Page 10-11       |
| 4.  | 5.00   | Central School Services Block (CSSB) 2024-25  | Lynsey Taylor   | Page 12-15       |
| 5.  | 5.15   | De-delegation 2024-25   | Lynsey Taylor   | To follow        |
| 6.  | 5.35   | Growth Funding 2024-25  | Lynsey Taylor   | Page 16-18       |
| 7.  | 5.50   | School Funding Update 2024-25   | Lynsey Taylor   | To follow        |
| 8.  | 6.10   | Council Financial Position  | CW&C<br>Finance | Verbal<br>update |
| 9.  | 6.20   | Any Other Business  |                 |                  |
| 10. | 6.30   | Next meeting: Monday 12 February 2024   |                 |                  |
|     | Finish | Schedule of meetings 2023-2024  |                 | Page 19          |

**Cheshire West and Chester  
Schools Forum  
16 January 2024**

**Agenda item 2**

**Minutes of Cheshire West and Chester Schools Forum, virtual meeting, on 10  
October 2023**

| <b>Members</b>               | <b>Representing</b>                      | <b>Attendance</b> |
|------------------------------|--|-------------------|
| <b>Schools and Academies</b> |  |                   |
| Jan Diamond                  | Primary headteachers                     | Attended          |
| Nicky Dowling                | Primary headteachers                     | Attended          |
| Vacancy                      | Primary headteachers                     | Vacancy           |
| Kate Docherty                | Primary headteachers                     | Attended          |
| Beth Hacking                 | Primary headteachers                     | Apologies         |
| Sharon Broughton             | Primary governors                        | Absent            |
| Lisa Rigby                   | Primary governors                        | Absent            |
| Vacancy                      | Primary governors                        | Vacancy           |
| Nick Lacey                   | Primary governors                        | Attended          |
| David Curry                  | Secondary headteachers                   | Attended          |
| David Rowlands (Vice Chair)  | Secondary governors                      | Attended          |
| Vacancy                      | Secondary governors                      | Absent            |
| Neil Oxley                   | Special headteachers                     | Attended          |
| Philip Hopwood               | Special governors                        | Apologies         |
| Andy Stewart                 | PRU                                      | Apologies         |
| Sian Thomas                  | PRU                                      | Substitute        |
| Deborah Beaumont             | Academies - mainstream                   | Attended          |
| Simon Faircloth              | Academies - mainstream                   | Apologies         |
| Darran Jones                 | Academies - mainstream                   | Attended          |
| Duncan Haworth (Chair)       | Academies - mainstream                   | Attended          |
| Helen Studley                | Academies - mainstream                   | Apologies         |
| Cathryn McKeagney            | Academies - mainstream                   | Apologies         |
| Vacancy                      | Academies - mainstream                   | Vacancy           |
| Vacancy                      | Academies - mainstream                   | Vacancy           |
| Michelle Duval               | Academies - special                      | Attended          |
| <b>Non Schools</b>           |  |                   |
| Cat Hirst                    | PVI early years providers                | Absent            |
| Vacancy                      | PVI early years providers                | Vacancy           |
| Kathryn Magiera              | Diocese                                  | Absent            |
| Caroline Vile                | Diocese                                  | Apologies         |
| Greg Foster                  | Unions                                   | Apologies         |
| Geoff Wright                 | Unions                                   | Absent            |
| Ian Devereux Roberts         | CWAPH                                    | Attended          |
| Vacancy                      | 16-19 providers                          | Vacancy           |
| <b>Official Observers</b>    |  |                   |
| Councillor Adam Langan       | Cabinet Member for Children and Families | Absent            |
|                              | Education Skills & Funding Agency        | Absent            |

**Invited Observer**

Councillor Lynn Stocks

Shadow Cabinet Member for  
Children and Families

Apologies

**Officers in attendance**

Helen Brackenbury

Acting Deputy Chief Executive (Health and Wellbeing)

Debbie Edwards

Head of Education and Inclusion

Charlotte Fenn

Clerk

Debra Goodall

Head of Health and Wellbeing Finance

Janine Smart

School Admissions and Capital Development Manager

Lynsey Taylor

Finance Manager

Bo White

Early Years Commissioner

**1. Introductions and apologies**

Duncan Haworth informed Forum that the meeting was being recorded.

Duncan reported that he had been re-elected as Schools Forum Chair for a further term of office.

Duncan welcomed Lynsey Taylor and Debra Goodall to their first meeting, and they introduced themselves.

Apologies and substitutes were noted.

Duncan reported the following updates to Forum membership: -

- Kate Docherty re-elected for another term of office as Primary Head representative.
- Duncan Haworth elected as mainstream Academy representative and had resigned as Primary governor representative.
- David Curry was continuing as Secondary Head representative and Martin Hill had stepped down, following the review and revision of Schools Forum membership - item 7 last meeting.

**2. Minutes and matters arising of last meeting****2.1 To agree the minutes from the meeting held 4 July 2023**

The minutes of the meeting held on the 4 July 2023 were agreed as a correct record.

**2.2 Matters arising****Item 7 Annual review of the Cheshire West and Chester Schools Forum's membership, constitution, and terms of reference**

Duncan reported that nominations were being sought to fill the vacancies following the recent changes in membership and the deadline was Friday 13 October 2023.

### **3. Education – Capital Programme 2023-2027**

Janine Smart introduced the report which contained an update on the Education Basic Need Capital Programme and provided a brief overview of the content.

Janine drew Forum members attention to the link to the DfE interactive scorecard, now available online, which provided an overview of primary and secondary sectors regarding quantity, pupil forecast accuracy, preference around admissions, quality of places and capital cost and comparisons nationally and with other Local Authorities.

Janine referred Forum members to the table in appendix 1 which identified the planning areas and sectors, number of places to be provided and when. It also gave an indication of the areas where data was being looked at to give an indication of future needs on those areas. It was noted that there were a significant number of places being added in both primary and secondary sectors.

No comments or questions from Forum to report.

**Resolved that the Schools Forum note the paper.**

### **4. Early Years Funding Formula (EYFF) Consultation and proposal for 2024-2025**

Bo White introduced the report which provided an overview of the recent Early Years Funding Formula (EYFF) Consultation in relation to expansion of the early years entitlements to working families of 2-year-olds and under and went through the core elements.

Forum members' attention was drawn to table 1 that set out the rules and regulations that local authorities must follow which CW&C were compliant with regarding three- and four-year-olds.

Bo referenced the current EYFF for allocating funding for three- and four-year-old entitlements for 2023-2024 as shown in Table 2. The proposals for the new entitlements for 2-year-olds and under 2-year olds was to adopt the existing local deprivation and rurality supplement with separate base rates for the younger provision as government had proposed some illustrative hourly rates of around £7-£8 for two-year-olds and around £10 per hour for babies to reflect staffing ratios.

The consultation feedback showed a majority consensus in agreement to the proposals from providers.

Bo referred forum members to table 3 which showed the proposed composition of formulae for each of the three funding entitlements alongside the existing 3- and 4-year-old funding formula, there would be different base rates for each of the entitlements.

Bo stated that in terms of the impact on providers it was felt that the rates looked favourable and more simplistic to be applied in a consistent manor, deprivation supplement was still appropriate as it was important to provide a financial incentive to providers to support families, the rurality supplement would also apply given this was our biggest challenge in recruitment and retention as rural providers continued to struggle, Bo also acknowledged that this was a sector wide issue.

Bo referred Forum to the full breakdown of consultation responses in appendix B. It was noted that comments were largely focused on the different levels of funding between the different age groups which was proving to be a little contentious and funding levels for three and four-year olds being below the market rate. Officers were aware of this and had highlighted this as a risk in the past.

Bo acknowledged that as these were very new entitlements, what the new demand would be and the impact on providers was unknown at this stage, they may wish to consider a contingency fund.

Duncan Haworth acknowledged that at this stage there was nothing else Forum could do but accept that what comes out of the national discussion would be put to Forum. Bo commented that they were waiting for the rules and regulations to be set and were anticipating that the three to four years olds criteria would be applied to the new formula, we would be able to set our deprivation supplement to any level and make decisions as to which other supplements wish to use.

David Rowlands voiced his concerns regarding the reference to deprived areas as it was people who were deprived, if they did not live in what was classified as a deprived area their chances of getting the help they need was reduced. Bo acknowledged David's comments but stated currently that was the best tool they had to determine deprivation. Bo also referred to early years pupil premium which providers could claim for, depending on families' economic circumstances.

### **Resolved that Schools Forum**

- i. note the proposals set out in the national EYFF consultation; and
- ii. endorse the recommendation to adopt the existing local Deprivation and Rurality supplements in the formulae for the new entitlements for 2-year-olds and under 2-year-olds and await the outcome of the national consultation and whether or not the proposal for all current rules local authorities must follow when setting their own local funding formulae for the new entitlements is agreed. Should this be the case we would seek to introduce the new formulae consistent with our existing 3- and 4-year-old formula from April 2024.

## **5. School Funding Arrangements for 2024-2025**

Lynsey Taylor reported that the DfE had informed the Council yesterday (9 October 2023) that they had made errors in the calculations they had published in July, so the report had been revised to incorporate the revised calculations. A copy would be circulated after the meeting.

Lynsey shared the revised report on screen and went through the recommendations and highlights which included the summary of the change in CW&C allocation announced to date in paragraph 5, increases reflected in paragraph 6 and the approach to setting the school block funding formula under paragraph 11. It was noted that the finance tables in appendix A & B had been updated and showed the illustrative funding allocations and funding factors.

Neil Oxley sought clarification regarding the statement that ‘the high needs NFF will ensure that every local authority receives at least a 3% increase per head’ as to whether special schools funding would therefore increase by 3% per head. Lynsey reported that the LA passed on as much as they could to schools but this was not the final allocation and was just illustrative at this stage; funding would be consulted on in December when the final allocations were received and figures worked out.

David Rowlands asked if we were working on the assumption that only children in Special schools had these higher needs or do we recognise that some of the children in broader education also have higher needs and may need extra funding. Debbie Edwards responded that the high needs funding supported a range of different projects in schools and special schools, how the funding was to be distributed had not been determined yet, but it was across the whole spectrum and not just special schools that benefited from the high needs funding.

David Rowlands commented that they were all aware that the demand for funding for special needs tended to increase far faster than the funds and this had been the pattern for several years, and asked if there were any signs of a change in that. Lynsey responded that demand was outstripping the funds available, and we were in a deficit overall as government funding was not keeping up with demand. Government were being kept informed that this was the situation. Debbie commented that it was important to note that we are running in a deficit as we, as a Council, are taking the view that we are supporting children where they need supporting and this is a national crisis in terms of all local authorities receiving the appropriate funding. Debbie reassured colleagues that children were not being penalised with the deficit position of budgets across the country.

It was noted that the local authority will need to submit disapplication requests for the two exceptional circumstances in Cheshire West & Chester. Those being Upton-by-Chester High School sports facilities and Wincham Primary School rental of a hall. The submission date for local authorities to submit any application for exceptional circumstances to the ESFA is 17 November 2023. Officers will liaise with these schools directly to review the applications to maintain the existing exceptional circumstances in the Borough.

### **Resolved that that Schools Forum**

- i. note the report, in particular the proposals that have been put forward by the Finance Subgroup not to further consult with schools on the schools block funding formula as no changes are proposed. Consultation will be held with schools on the decisions to be taken by Schools Forum on other funding elements for the December meeting; and
- ii. endorsed the Schools Block funding formula continuing to mirror the Schools National Funding Formula (SNFF) values for 2024-2025.

## **6. Final Allocation of the Dedicated Schools Grant for 2023-2024**

Lynsey Taylor went through the report which contained the final allocation of the Dedicated Schools Grant (DSG) for 2023-2024 as published by the Education and Skills Funding Agency in July 2023.

Reference was made to table 1 which summarised the changes to the final DSG allocation and final allocation in table 2 after academy recoupment deductions in relation to de-delegation and rates liabilities.

No questions or comments from Forum to note.

**Resolved that the Schools Forum note** the amendments to the DSG allocation for the high needs and early years funding blocks and the adjustments to centrally held budgets for 2023-2024.

## **7. Dedicated Schools Grant (DSG) 2023-2024 Forecast Outturn at First Review**

Lynsey Taylor introduced the report which provided an update on the financial forecast outturn position for 2023-2024 for centrally held DSG as reported at the First Review.

Lynsey drew Forums attention to the overall outturn position pressure of £3.9m and the forecast overspends outlined in paragraph 3.

No questions or comments from Forum to note.

**Resolved that Schools Forum note the First Review position on the DSG**

## **8. Any Other Business**

Helen Brackenbury thanked Lynsey and Debra, who were both new to CW&C, and the work done today following the announcement from the DfE. It was acknowledged that Lynsey had tried to make sure colleagues had the revised position in the time allowed but that questions might arise following a comparison of reports. Any questions should be directed to Lynsey, Debra or Helen.

## **9. Next meeting**

Next Schools Forum meeting Tuesday 5 December 2023.

### **Agenda Item 3**

#### **Dedicated Schools Grant (DSG) 2023-24 Forecast Outturn at Third Review**

##### **Purpose of the Report**

1. The purpose of the report is to provide an update on the financial forecast outturn position for 2023-2024 for centrally held DSG as reported at the Third Review of Financial Performance. This is based on the forecast position on 30 November 2023.

##### **Recommendations**

2. The Forum is asked to note the Third Review position on the DSG and next steps.

##### **Forecast Outturn**

3. The service is currently forecasting an overspend of £5.420m on DSG budgets which is a worsened position compared to the forecast overspend of £3.920m reported to Forum in October based on the First Review position (as at the end of July).
4. Within this overall position of £5.4m, there is a forecast overspend £6.1m on the high needs provision budgets for SEN pupils with mainstream and special school top up funding, independent school placements, alternative provision and tuition packages. These pressures are currently being partially offset by forecast underspends of £1.3m on Independent school fees for non SEN pupils £0.120m, Inter Authority placements £0.307m, Resource Provision Growth £0.178m and SALT £0.204m. The forecast position also assumes a further £0.157m of further slippage during the year from service vacancies and planned spend until the recommendations from the SEND review can be implemented. The remaining overspend relates to Home to School Transport £0.6m.
5. The forecast position currently assumes a balanced position for early years budgets. The revised funding allocation for 2023-24 will be determined from the take up reported in the January 2024 census and may result in a change to the overall reported DSG position when this is received.
6. The key variances and changes from the First Review position are summarised in the table below.

| Budget 2023/24                                     | Forecast variance Overspend/ - underspend Third Review £'000 | Forecast variance Overspend/ - underspend First Review £'000 | Change in Forecast £'000 |
|--|--|--|--------------------------|
| Independent and non- maintained school fees        | 1,790  | 1,473  | -317                     |
| Top up funding mainstream                          | 2,106  | 1,726  | -380                     |
| Special school funding                             | -377   | -377   | 0                        |
| Post 16 top up funding                             | 332  | 417  | 85                       |
| Alternative Provision                              | 297  | 297  | 0                        |
| Inter Authority Placements                         | -307   | -394   | -87                      |
| Non SEN Independent schools                        | -120   | -120   | 0                        |
| Slippage in resource provision growth              | -178   | -178   | 0                        |
| Slippage in investment in SALT                     | -204   | -204   | 0                        |
| Other SEN provision (inc EOTAS)                    | 178  | -105   | -283                     |
| Vacancy Savings                                    | -157   | -54  | 103                      |
| Deficit  | 1437   | 1,437  | 0                        |
| Home To School Transport Movement from Base Budget | 624  | 0  | -624                     |
| <b>Total variance reported</b>                     | <b>5,420</b>   | <b>3,920</b>   | <b>1,500</b>             |

## DSG Reserve

7. The table below summarises the forecast position on the DSG reserve as at Third Review.

|   | £000         |
|---|--------------|
| DSG reserve brought forward (deficit)       | 2,713        |
| <b>In year allocation of reserves</b>       | 0            |
| Forecast in year deficit 2023-24            | 5,420        |
| <b>Forecast deficit reserve for 2023/24</b> | <b>8,133</b> |

## Next Steps

8. The service will continue to monitor the position and seek mitigations where possible however the forecast position is a further increase to the brought forward deficit on the DSG reserve with a cumulative £8.133m forecast by the end of 2023-24

**Agenda Item 4**

**Central School Services Block (CSSB) 2024-25**

**1.0 Purpose of the report**

- 1.1 This report provides Schools' Forum with a line by line breakdown of the Central School Services Block (CSSB) for 2024/25, and seeks approval for the amounts on each line.
- 1.2 This report reminds Schools' Forum of the responsibilities that local authorities hold for all Schools.

**2 Recommendations**

- 2.1 That Schools' Forum approves the amounts on each line within the CSSB for 2024/25.
- 2.2 That Schools' Forum notes the responsibilities of the local authority for all schools in the Cheshire West and Chester area.

**3. Background**

- 3.1 The CSSB was introduced in 2018/19 to fund local authorities for the statutory duties they hold for both maintained schools and academies. The CSSB brings together:
- Funding previously allocated through the retained duties element of the Education Services Grant (ESG).
  - Funding for ongoing central functions, such as admissions, previously top-sliced from the schools block.
  - Residual funding for historic commitments, previously top-sliced from the schools block.
  - Funding for the Teachers' Pension Employer Contribution Grant (TPECG) for centrally employed teachers

**4 CSSB 2024-25**

- 4.1 In 2024/25, ongoing responsibilities have been funded in broadly the same way as previously with updated baselines in line with the 2023/24 Dedicated Schools Grant (DSG) allocations. Funding for 2024/25 is £2,190,981 (Pupil head count of 46,272 x £38.39 unit of funding).
- 4.2 Funding for historic commitments in 2024/25 is £2,190,981 compared to £2,232,157 in 2023/24. This funding was again reduced by 20% from the

2023/24 amount. The Department for Education's (DfE) expectation remains that expenditure from DSG will also reduce over time, as contracts and other commitments reach their end points, and they will continue to monitor this expenditure year-on-year. The DfE will seek explanations of expenditure recorded on section 251 returns where this is not reducing as expected.

- 4.3 Where local authorities hold duties in relation to all schools (as set out in schedule 2 part 1 to 5 of The School and Early Years Finance (England) (No. 2) Regulations 2023 all schools must be treated on an equivalent basis.
- 4.4 Schools' Forum approval is required to confirm the amounts on each line. Table 1 below provides a line by line breakdown of the local authority CSSB allocations for 2024/25 and for comparative purposes the approved 2023/24 values.

**Table 1 - Central School Services Block Allocations 2024/25**

| Description  | 2023/24        | 2024/25        | Note  |
|--|----------------|----------------|---|
|  | £              | £              |   |
| <b>Historic Commitments (Prior to April 2013)</b>                            |                |                |   |
| Prudential borrowing costs   | 518,247        | 414,598        | (Schedule 2, paragraph 2(a)). <b>Schools' Forum approval is required.</b>   |
| <b>Sub Total</b>   | <b>518,247</b> | <b>414,598</b> |   |
| <b>Ongoing Responsibilities</b>  |                |                |   |
| Admissions   | 707,060        | 707,060        | Expenditure on the operation of the system of admissions of pupils to schools (including expenditure incurred in carrying out consultations under section 88C (2) of the 1998 Act(b)) and in relation to appeals. <b>Schools' Forum approval is required.</b> |
| Servicing of schools' forum  | 41,476         | 41,476         | Expenditure incurred in connection with the LA's functions of running the forum as defined under section 47A of the 1998 Act (addition under Section 43 of Education Act 2002). <b>Schools' Forum approval is required.</b>                                   |
| Contribution to responsibilities that local authorities hold for all schools | 645,466        | 707,939        | In 2017/18 the Education Services Grant (ESG) retained rate was included in the schools block of the Dedicated Schools Grant allocation. Appendix A provides  |

|   |                  |                  |  |
|---|------------------|------------------|--|
|   |                  |                  | details of the services included under this line. <b>Schools' Forum approval is required.</b>  |
| Central licences negotiated by the Secretary of State | 319,908          | 319,908          | The DfE has agreed with the following agencies to purchase a single national licence managed by the Department for all state funded schools in England: <ul style="list-style-type: none"> <li>• Christian Copyright Licensing International (CCLI)</li> <li>• Copyright Licensing Agency (CLA)</li> <li>• Education Recording Agency (ERA)</li> <li>• Filmbank Distributors Ltd. (for the PVSL)</li> <li>• Mechanical Copyright Protection Society (MCPS)</li> <li>• Motion Picture Licensing Company (MPLC)</li> <li>• Newspaper Licensing Authority (NLA)</li> <li>• Performing Rights Society (PRS)</li> <li>• Phonographic Performance Limited (PPL) <ul style="list-style-type: none"> <li>• Schools Printed Music Licence (SPML) <b>Schools' Forum approval is not required (although they should be consulted).</b></li> </ul> </li> </ul> |
| <b>Sub Total</b>                                      | <b>1,713,910</b> | <b>1,776,383</b> |  |
|   |                  |                  |  |
| <b>Total Central School Services Block</b>            | <b>2,232,157</b> | <b>2,190,981</b> |  |

**Please Note: we are awaiting from DfE the central licences charge for 2024/25. Any adjustments will be made to the 'contribution line for responsibilities held for all schools'.**

## Appendix A- Responsibilities that Local Authorities Hold for All Schools

### Responsibilities held for all schools

#### Statutory and regulatory duties

- Director of children's services and personal staff for director (Schedule 2, paragraph 15a)
- planning for the education service as a whole (Schedule 2, paragraph 15b)
- authorisation and monitoring of expenditure not met from schools' budget shares (Schedule 2, paragraph 15c)
- formulation and review of local authority schools funding formula (Schedule 2, paragraph 15d)
- internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of the Local Government Act 1972 except duties specifically related to maintained schools (Schedule 2, paragraph 15e)
- consultation costs relating to non-staffing issues (Schedule 2, paragraph 19)
- plans involving collaboration with other local authority services or public or voluntary bodies (Schedule 2, paragraph 15f)
- standing Advisory Committees for Religious Education (SACREs) (Schedule 2, paragraph 17)
- provision of information to or at the request of the Crown other than relating specifically to maintained schools (Schedule 2, paragraph 21)
- revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Schedule 2, paragraph 22)

#### Education welfare

- functions in relation to school attendance (Schedule 2, paragraph 16)
- responsibilities regarding restrictions on the employment of children (Schedule 2, paragraph 18)
- functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Schedule 2, 20)

#### Asset management

- management of the local authority's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Schedule 2, paragraph 14a)
- landlord responsibilities, including those in relation to land leased to academies for schools (Schedule 2, paragraph 14b)

**Agenda item 6**

**Growth Funding 2024-25**

**1 Purpose of the Report**

- 1.1 To provide Forum members with an update on how growth funding was allocated in 2023/24.
- 1.2 To obtain approval to set a growth fund of £351,500 for 2024/25, and to continue with the current growth funding criteria and methodology.

**2 Recommendations**

- 2.1 That the Schools' Forum notes the content of the report and approves the amount and proposals relating to the operation of the growth fund for 2024/25 onwards.

**3 Background**

- 3.1 Growth funding is within local authorities' schools block allocation. For 2024/25 growth funding has again been allocated to local authorities using a formulaic method based on lagged growth data, instead of a historic basis.
- 3.2 For 2024/25 growth funding allocation for Cheshire West and Chester within the schools' block totals £777,653.
- 3.3 As it is within the schools block, a movement of funding from the schools formula into the growth fund would not be treated as a transfer between blocks.

The growth fund can only be used to:

- Support growth in pre-16 pupil numbers to meet basic need.
- Support additional classes to meet the infant class size regulation.
- Meet the costs of new schools

The growth fund may not be used to support:

- Schools in financial difficulty (any such support for maintained schools should be provided from a de-delegated contingency).
- General growth due to popularity (which is managed through lagged funding).

- 3.4** In accordance with Department for Education (DfE) guidance local authorities are required to produce criteria on which growth funding is to be allocated. It should provide a transparent and consistent basis for the allocation of funding. The criteria should both set out the circumstances in which payment could be made and provide a basis for calculating the sum to be paid.
- 3.5** The local authority is also required to consult the Schools' Forum and gain agreement on the total size of the growth fund and the criteria used to allocate funding.
- 3.6** Any funds remaining at the end of the financial year must be added to the following year's Dedicated Schools Grant (DSG) but may be earmarked for the same purpose.

#### **4 Growth Fund 2023/24**

- 4.1** The 2023/24 growth fund was set at £502,523.
- 4.2** The agreed criteria used to allocate funding consisted of the following:
- Allocation based on basic need only.
  - Applicable to schools where the local authority have officially agreed a change in Published Admission Number (PAN).
  - Funding is for pupils in Reception (Year 3 for Junior schools)/Year 7, above the original PAN up to and including the new PAN, based on the change in pupil numbers between October Censuses.
  - Anything above the new PAN is classified as general growth.
  - Funding will continue year on year until the PAN change has filtered through all year groups.
  - Funding for a bulge class will be a one-off payment based on the agreed number of pupils in the bulge class.
  - Primary schools AWPU £3,388 per pupil, Secondary schools KS3 AWPU £4,779 per pupil multiplied by 7/12 representing the period September to March which is not funded within the school's budget share.
- 4.3** In accordance with DfE guidance where growth funding is payable to academies, the local authority is required to fund the increase for the period from the additional September intake through until the following August. The local authority should enter the cost of growth funding for the April – August period on the recoupment tab of the Authority Proforma Tool (APT) so that the recoupment calculation can be adjusted accordingly.
- 4.4** Based on the above criteria the actual growth expenditure for 2023/24 will be £132,479.

## **5 Growth Funding 2024/25**

**5.1** The Growth Funding for 2024/25 allocation has decreased from £1,554,469 by £776,816 for 2024-2025 to £777,653. Of the £777,653 growth allocated to Cheshire West & Chester £351,500 is required to meet temporary increases in primary and secondary admissions in September 2024 and growth in resource provision. The remainder of the growth fund allocation £426,153 is being allocated through the schools block funding formula and will be distributed to schools through the formula allocations.

## **6. Next Steps**

**6.1** The local authority will also continue to use the criteria used in 2023/24 to allocate growth funding because, in accordance with DfE guidance, it contains clear objective trigger points for qualification and a clear formula for calculating allocations. The only change will be that the primary and secondary funding values will increase in line with the values included within the schools funding formula for 2024/25.

**Cheshire West and Chester  
Schools Forum  
16 January 2024**

**Agenda item 10**

**Schedule of meetings 2023-2024 – all meetings 4.30pm – 6.30pm**

| <b>Date</b>                | <b>Venue</b> | <b>Proposed agenda</b>   |
|----------------------------|--------------|--|
| Monday 12<br>February 2024 | MS Teams     | <ul style="list-style-type: none"> <li>• Early Years Funding for 2024-2025</li> <li>• Arrangements for funding from the High Needs Block 2024-2025</li> </ul>  |
| Tuesday 2<br>July 2024     | MS Teams     | <ul style="list-style-type: none"> <li>• DSG 2023-2024 outturn</li> <li>• School balances at the end of 2023-2024 (with appendices for schools and academies)</li> <li>• Directed revisions to schemes for financing schools</li> <li>• Annual review of Schools Forum membership, constitution, and terms of reference</li> </ul> |

**Schools Forum Finance sub-group**

| <b>Date</b>             | <b>Time</b>    | <b>Venue</b> |
|-------------------------|----------------|--------------|
| Tuesday 23 January 2024 | 2.00 – 4.00 pm | MS Teams     |
| Tuesday 11 June 2024    | 2.00 – 4.00 pm | MS Teams     |