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**Service Director – Legal, Governance and
Commissioning**

Julie Muscroft

The Democracy Service

Civic Centre 3

High Street

Huddersfield

HD1 2TG

Tel: 01484 221000

Please ask for: David Gearing

Email: david.gearing@kirklees.gov.uk

Thursday 8 October 2020

Notice of Meeting

Dear Member

Kirklees Schools Forum

A virtual meeting of the **Kirklees Schools Forum** will be held **online** at **10.30 am** on **Friday 16 October 2020**.

The items which will be discussed are described in the agenda and there are reports attached which give more details.

A handwritten signature in black ink, appearing to read "Julie Muscroft".

Julie Muscroft

Service Director – Legal, Governance and Commissioning

Kirklees Council advocates openness and transparency as part of its democratic processes. Anyone wishing to record (film or audio) the public parts of the meeting should inform the Chair/Clerk of their intentions prior to the meeting.

Agenda

Reports or Explanatory Notes Attached

Pages

If you would like to register to attend the meeting please email:
LearningSeniorManagementSupport@kirklees.gov.uk
no later than 5.00 pm on Thursday 15 October 2020

1: Apologies for absence

2: Minutes of the Forum meeting held on 6th March 2020 1 - 6

[The public meeting on 26th June was cancelled due to the health emergency]

3: Matters arising from the 6th March 2020 meeting

4: Membership update for 20/21 academic year 7 - 12

5: Kirklees Education & Learning Partnership Board (standing item)

KELPB Members

6: High Needs Budget (standing item)

7: Ongoing (financial) implications for schools arising from the Covid-19 health emergency

8: ESFA-directed revisions to the Scheme for Financing Schools

David Gearing

9: 2019-20 DSG Outturn summary and decisions arising therefrom 13 - 20

David Gearing

10: Schools Funding 2021-22 - news from the ESFA

21 - 22

David Gearing

11: Any other business

12: Confirm minutes

13: Date and time of next meeting

Friday 27th November 2020 - details of venue or on-line meeting to be confirmed

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THE KIRKLEES SCHOOLS FORUM

meeting held on **Friday 6th March 2020**

10:00am at the Textile Centre of Excellence

Present:

	Nursery School Heads (1)
Louise Brown, Claire Minogue, Martin Vayro	Primary School Heads (5)
	High School Heads (1)
Paul Evans	Special School Heads (1)
Laura Flynn	Special Academy Heads (1)
Catherine Jubbs, Michelle Lee [Chair], David Wadsworth	Academy Heads (4)
Martin Ridge	Pupil Referral Units (1)
Paul Davies	Kirklees Governors (1)
Paula Wescott (NASUWT)	Non-school members (5)
David Gearing (Financial Delegation Manager); [Minute Clerk] Natalie McSheffrey – Relationship Manager, Schools & Settings Jo-Anne Sanders – Service Director, Learning & Early Support	Officers in Support
	Observers

1. Apologies for absence

Apologies had been received from Darren Christian (Academy Heads), Karen Colligan (High School Heads), Andi Gilroy-Sinclair (Nursery School Heads), Carmen Gonzalez-Eslava (Post-16), Jenny Shore (Primary School Heads), Harkireet Sohel (Head of Service – Educational Outcomes), Martin Wilby (Senior Strategic Manager – Education Places & Access) and Diana Wilson (Primary School Heads).

2. Minutes of the Schools Forum Public meeting held on 29th November 2019

The minutes were agreed to be a true record of the meeting.

3. Matters arising from the Schools Forum Public meeting 29th November 2019

3.1 Outcome of outstanding Disapplication requests 2020-21 (minute 3.1 of the 29th November meeting)

It was reported to Forum that the Education & Skills Funding Agency had given permission for a second adjustment in 2020-21 to the baseline funding of the primary school in question to continue the process of removal of the identified element of overfunding within their budget share allocation.

A very late disapplication request had also been submitted and approved giving permission to set a higher minimum funding guarantee percentage than the original maximum of plus 1.84% in order to balance off the 2020-21 schools funding block account. This was necessary to be able to allocate a remaining sum of around £650k in a way that would benefit most schools. Other options had been explored but all attempts to build the remaining amount into any of the available formula factors simply triggered a counter movement downwards in either or both of the minimum per pupil funding factor and the Minimum Funding Guarantee (MFG) support allocation. The MFG for 2020-21 has been set at plus 2.18%, effectively raising the funding floor for 131 out of 170 mainstream schools. The other 39 were already in receipt of higher increases in their funding per pupil rates for 2020-21.

4. Kirklees Education & Learning Partnership Board

Michelle Wheatcroft, Head of Service - Early Support, had attended the Board to discuss the Community Hubs and Early Support Service reorganisation and the perceived benefits it will bring. There will be additional capacity from the appointment of two new service managers later this month – one for Youth Services and one for Community Hubs (to be renamed “Family Centre Hubs”). There will also be a new second lead officer within Family Support. A revised organisation structure chart will be issued. The aim is to build back up some universal support services that had disappeared as a result of the austerity programme. It was asked whether the structure chart could also include some brief summary notes about post responsibilities under each role. The Community Hub Co-ordinator roles have been extended through to September 2020 to provide some space to consider the approach going forward.

Kirklees Active Leisure (KAL) attended to provide an update on how their management of local swimming services for schools is going. Generally it is seen to be going well. There has been lots of positive engagement and some extension of the service to families. The unavailability of Spen pool has been successfully worked around. KAL is working with a dozen or so schools to pilot longer swimming sessions (although it was commented at Forum that the sessions are not significantly longer). The swimming sessions provided are being quality assured by Sport England.

The extension of the DfE’s Risk Protection Arrangement to the maintained schools sector from April 2020 had also been discussed.

The Education Improvement Committee had examined a number of reading projects.

The Education Services Committee had considered Catering and Cleaning and Caretaking Services and some positive developments within those services. The Committee also considered whether the letters of assurance approach covering Kirklees staff visiting / doing work in Kirklees schools was compliant with safeguarding requirements – the approach was regarded as satisfying compliance at a minimum level so ways to enhance the arrangement were discussed.

A statement has been issued via HeadsUp on the topic of Relationship and Sex Education. School representatives are working with officers to draft a model policy for schools to adopt. It was also reported that the West Yorkshire Teaching Alliance had been successful in bidding for PHSCE training monies.

5. High Needs Budget (Ronnie Hartley, Head of Service, Education Safeguarding & Inclusion attended the meeting for this item)

Following on from the briefing provided to the last Forum meeting about the discussions at the Forum’s High Needs Task & Finish Group, Ronnie Hartley reported a slight delay to the timescale for progressing the work on the future shape of mainstream top-up funding. The task and finish group had helped to establish the governing principles of the review and officers will now meet to conduct an options appraisal on 16th March and reconvene the Task & Finish Group thereafter. The aim would be to set an implementation date for the new top-up funding method of September 2020.

6. Details of the 2020-21 DSG settlement and the shape of school funding for 2020-21

Details of the 2020-21 Dedicated Schools Grant (DSG) settlement for Kirklees and how it compares to the previous year's settlement were included with today's agenda papers.

a) Schools Block

The pure Schools Block has increased from £293.5m in 2019-20 to £302.18m for 2020-21, a rise of £8.68m. The minor part of the increase is attributable to having 115 more pupils on the October 2019 pupil census return but the majority of the rise is driven by the average 4% increase to the National Funding Formula (NFF) factor values for 2020-21, including the higher minimum per pupil check values of £3,750 for primary schools and £5,000 for secondary schools. The overall rise in the Schools Block for 2020-21 is worth 2.96%. Whilst all schools will see the benefit of the formula factor unit value increases, many schools will experience a consequential reduction in the amount of cash protection layered on top of their NFF outcome. The worst case net effect of the two opposing movements would see a school gaining by a minimum increase of 1.84% per pupil on last year's baseline (but it has subsequently proved possible to deliver a minimum increase of 2.18% per pupils – see 3.1 above).

b) Growth provision within the Schools Block

The formula growth method brought in last year allocated £1.76m to Kirklees in 2019-20. The tail-off in growth pressure has seen this drop to £1.59m in 2020-21 although the fall would have been larger still if the DfE hadn't removed the gains cap which applied last year. [£165k was knocked off Kirklees' growth formula outcome in 2019-20 to produce the £1.76m result]. Any growth funds not needed to address within the funding allocations the addition of new year group intakes for those schools still adding a year group from the start of each academic year will be added to the Pupil Growth Fund for 2020-21 (see item 7 below).

c) Central Schools Services Block

Kirklees' CSSB allocation has again seen a reduction from the previous year's level - £2.22m compared to £2.30m in 2019-20. A 2.5% reduction in the value allocated per pupil had been expected as the true NFF outcome is phased in, but on top of this a 20% cut (a further £34k loss) has been applied to the historic commitments element of the CSSB. This sort of cut has been threatened by the ESFA for some while based upon an assumption that historic commitments should be reasonably short-term and will "unwind" over time. That simply isn't true when the costs relate to annual pension payments. The ESFA have begun to listen to arguments from local authorities where their commitments are in reality much longer term in nature. Officers wrote to the ESFA, as requested, to explain the situation with regard to the ongoing pension payments charged to the DSG and the £34k funding will now be restored.

d) High Needs Block

More funding nationally has been committed to High Needs from 2020-21. This has seen Kirklees' High Needs allocation for 2020-21 rise from £37.06m in 2019-20 to £43.17m – an increase of £6.11m. There are indications also that Kirklees' eventual outcome from the High Needs NFF will garner another £5.8m on top of the 2020-21 position (although the Treasury has still to confirm departmental allocations beyond 2020-21 and there is no indication of how quickly the funding would be passed through should it be approved). The increase in funds

for 2020-21 is very welcome but still nowhere near sufficient to bring the High Needs account to a balanced position in-year.

e) Early Years Block

The Early Years Block figure is only an indicative one at this stage of the year. It will be firmed up once January 2020 census data is available. The indicative allocation shows a mixture of gains and losses across the various funding elements in comparison to 2019-20. Numbers of children accessing the universal 15 hours free entitlement for three and four year olds have fallen compared to a year ago (resulting in a loss of £68k) and numbers of disadvantaged two year olds in the system have also fallen (a loss of £115k). The number of children from eligible working families accessing the extended 15 hours entitlement has increased by approaching 10% since last year, resulting in an increase in funding of £674k. There have also been increases to both the Early Years Pupil Premium (+£51k) and the Disability Access Fund (+£10k) allocations. Overall, there is an indicative increase from £28.09m to £28.64m.

The shape of (mainstream) school funding for 2020-21

An analysis comparing the 2020-21 schools funding allocation factor by factor with the equivalent figures for the previous year was circulated to the meeting. The 4% average boost to the National Funding Formula factor values has reduced the amount of cash protection for schools within the system. In 2019-20 cash protection totalled around £14.5m above the pure operation of the national funding formula. Within the 2020-21 funding allocation this has reduced to approximately £10.6m.

7. Budget retention and de-delegation decisions for 2020-21. Cabinet approval of funding arrangements

Following a round of consultation with schools, discussions at Forum briefings and feedback gathered from constituent group meetings the tables below reflect the agreed retention budget decisions for financial year 2020-21.

Central School Services Block 2020-21

Budget provision	Proposed level	Notes
Servicing of the Schools Forum	£31,000	Unchanged from 2019-20
Historic DSG pension commitments	£170,400	Unchanged
Pupil Admissions Service	£401,900	Unchanged
School Organisation & Planning	£139,600	Unchanged
School Reorganisation Support	£292,000	Unchanged
National Copyright Licence charge	£331,100	Forum approval is not required. Budget level affected by volume change in pupil numbers and inflation.
Former Education Services Grant retained duties for all children	£886,200	Statutory and regulatory duties upon the Council for all school-age children. Amount reduced from £943,300 due to lower CSSB allocation in 2020-21 and the increased Copyright Licence charge
TOTAL	£2,252,200	[To match the total CSSB allocation 2020-21 with £34.1k cut restored]

'Growth' funding within the Schools Block 2020-21

Budget provision	Proposed level	Notes
Pupil Growth Fund	£600,000	Unchanged from 2019-20
Future pupil growth	£737,500	Retention of the unused element of formula-based growth monies within the PGF to continue to provide support for ongoing school reorganisations and restructures and to support necessary future changes.
TOTAL	£1,337,500	

Funding retained within the Early Years Block 2020-21

Budget provision	Proposed level	Notes
Early Learning and Childcare	£585,000	Free Early Education, Childcare Sufficiency and Early Years Outcomes Teams – funding to providers, free entitlement place sufficiency, supporting standards of delivery
Back office / management costs	£71,200	Finance, Payroll, HR, Legal, IT etc
Inclusion Support	£40,400	Contribution to the Inclusion Officer team
Miscellaneous	£12,000	Contribution to admissions, maternity, union duties etc
TOTAL	£708,600	

De-delegation 2020-21 (maintained mainstream schools only)

Budget	Primary per pupil	Secondary per pupil	Notes
Schools Contingency	-(£13.29)	-(£16.65)	Rates unchanged
Free School Meals eligibility checks	-(£1.03)	-(£1.29)	Rates unchanged
Maternity, paternity and adoptive leave	-(£29.32)	-(£29.32)	Rates unchanged
Trade Union facilities time	-(£5.72)	£0	Rates unchanged, Secondary sector to continue to not de-delegate.
Public Duties	-(£0.16)	-(£0.20)	Rates unchanged
International New Arrivals	-(£1.58)	-(£1.98)	Rates unchanged
School Improvement Commissioning	-(£4.50)	-(£12.01)	Rates unchanged
TOTALS	-(£55.60)	-(£61.45)	

School Funding 2020-21 Cabinet Report

It was reported that the recommendations in the 2020-21 report to Cabinet on school funding had been approved at their meeting of 14th January 2020.

8. Any other business

It was asked whether the Forum needs to discuss the implications that Coronavirus may have for schools and their finances. Further information and guidance will be made available to schools as the situation develops.

9. Date and time of next meeting

Friday 26th June 2020

10:00am start

Tolson Museum

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**OCT 2019 PUPIL CENSUS: FOR CALCULATION OF SCHOOLS FORUM PRIMARY/SECONDARY,
MAINTAINED/ACADEMY PROPORTIONATE REPRESENTATION FOR ACADEMIC YEAR 2020/21**

DfE No	School	Maintained Primary pupils	Maintained Secondary pupils	Academy Primary pupils	Academy Secondary pupils	Total pupils [Yr R-Yr 11]
MAINTAINED PRIMARY						
3045	All Hallows CE(VA) Primary	164				164
2043	Ashbrow Primary	401				401
3320	Batley Parish CE(VA) JI&N	209				209
3046	Battysford CE(C) Primary	419				419
2004	Berry Brow I&N	154				154
2006	Birkby I&N	421				421
2041	Birkby Junior	570				570
3048	Birkenshaw CE(C) Primary	423				423
3021	Brockholes CE(VC) J&I	208				208
3009	Bywell CE(VC) Junior	370				370
2005	Carlton J&I	210				210
2069	Clough Head J&I	83				83
2152	Crossley Fields J&I	582				582
2038	Crow Lane Primary & Foundation Stage	191				191
3041	Crowlees CE(VC) J&I	416				416
3325	Cumberworth CE(VA) First	124				124
2157	Dalton JI&N	461				461
3326	Denby CE(VA) First	72				72
2139	Denby Dale First & Nursery	143				143
2013	Earlsheaton Infant	119				119
3032	East Bierley CE(VC) Primary	206				206
2007	Eastborough JI&N	196				196
2081	Emley First	140				140
3036	Farnley Tyas CE(VC) First	53				53
2056	Fixby J&I	300				300
3022	Flockton CE(VC) First	93				93
2151	Golcar JI&N	426				426
2099	Gomersal Primary	416				416
3332	Gomersal St Mary's CE(VC) Primary	194				194
2096	Grange Moor Primary	87				87
2086	Hade Edge J&I	80				80
3014	Hanging Heaton CE(VC) J&I	134				134
2100	Hartshead J&I	87				87
3010	Headfield CE(VC) Junior	587				587
3037	Headlands CE(VC) JI&N	405				405
2154	Heckmondwike Primary	421				421
2087	Hepworth J&I	104				104
2134	High Bank J I & N	142				142
3023	Highburton CE(C) First	182				182
2102	Hightown JI&N	204				204
2088	Hinchliffe Mill J&I	91				91
2089	Holme J&I	36				36
2085	Holmfirth JI&N	187				187
3336	Holy Spirit Catholic Primary	210				210
2050	Honley CE(VC) J I&N	420				420
2097	Hopton Primary	314				314
2108	Howard Park Community Primary	206				206
2129	Hyrstmount Junior	350				350
2079	Kaye's F&N	163				163
3329	Kirkburton CE(VA) First	145				145

**OCT 2019 PUPIL CENSUS: FOR CALCULATION OF SCHOOLS FORUM PRIMARY/SECONDARY,
MAINTAINED/ACADEMY PROPORTIONATE REPRESENTATION FOR ACADEMIC YEAR 2020/21**

DfE No	School	Maintained Primary pupils	Maintained Secondary pupils	Academy Primary pupils	Academy Secondary pupils	Total pupils [Yr R-Yr 11]
2130	Kirkheaton Primary	379				379
3324	Linthwaite Ardron CE(VA) J&I	193				193
2148	Linthwaite Clough JI & EYU	311				311
2103	Littleton JI&N	175				175
3000	Lowerhouses CE(VC) JI&EY	188				188
2122	Lydgate J&I	279				279
2110	Manorfield I&N	253				253
2073	Marsden I&N	129				129
3028	Meltham CE(C) Primary	413				413
2065	Mill Lane Primary	161				161
2145	Moldgreen Community Primary	343				343
3410	Moorlands Primary	635				635
2153	Mount Pleasant Primary	581				581
2090	Netherthong Primary	216				216
2045	Newsome Junior	221				221
2075	Nields JI&N	191				191
2135	Norristhorpe J&I	417				417
2032	Oak CE Primary	762				762
3402	Our Lady of Lourdes Catholic Primary	209				209
2025	Paddock JI&N	335				335
2066	Park Road JI&N	199				199
2144	Pentland I&N	139				139
2067	Purlwell I&N	196				196
3001	Ravensthorpe CE(VC) Junior	418				418
2035	Rawthorpe Junior	320				320
3002	Rawthorpe St James CE(VC) I&N	205				205
2036	Reinwood Community Junior	447				447
2037	Reinwood I&N	269				269
3034	Roberttown CE(VC) J&I	243				243
2120	Rowley Lane JI&N	422				422
3004	Savile Town CE(VC) I&N	87				87
2074	Scapegoat Hill J&I	79				79
2091	Scholes J&I (Holmfirth)	211				211
2114	Scholes Village Primary	213				213
2014	Shaw Cross I&N	177				177
2095	Shepley First	166				166
3016	Slaithwaite CE(VC) J&I	170				170
3314	South Crosland CE(VA) Junior	235				235
2028	Spring Grove JI&N	208				208
3323	St John's CE(VA) J&I	202				202
3003	St John's CE(VC) Infant(Dews)	144				144
3310	St Joseph's Catholic Primary, Dews	209				209
3400	St Joseph's Catholic Primary,Hudds	292				292
3304	St Mary's Catholic Primary	301				301
3405	St Patricks Catholic Primary, Birstall	243				243
3401	St Patricks Catholic Primary, Hudds	420				420
3408	St Paulinus Catholic Primary	397				397
3321	St Peter's CE(A) JI&EY	209				209
3049	St Thomas CE(VC) Primary	415				415
3015	Staincliffe CE(VC) Junior	341				341
3008	Thornhill Lees CE(VC) I&N	215				215
3027	Thurstonland Endowed (VC) First	65				65

**OCT 2019 PUPIL CENSUS: FOR CALCULATION OF SCHOOLS FORUM PRIMARY/SECONDARY,
MAINTAINED/ACADEMY PROPORTIONATE REPRESENTATION FOR ACADEMIC YEAR 2020/21**

DfE No	School	Maintained Primary pupils	Maintained Secondary pupils	Academy Primary pupils	Academy Secondary pupils	Total pupils [Yr R-Yr 11]
2125	Upperthong J&I	218				218
2068	Warwick Road Primary	344				344
2076	Wellhouse J&I	71				71
2023	Westmoor Primary	478				478
3412	Whitechapel Primary	413				413
2077	Wilberlee J&I	85				85
2016	Windmill CE Primary	421				421

MAINTAINED SECONDARY

4613	All Saints Catholic College		839			839
4046	Holmfirth High		1330			1330
4009	Nether Hall Learning Campus High		625			625
4022	Newsome High & Sports College		569			569
4801	North Huddersfield Trust		747			747
4061	Spenn Valley High		927			927
4057	Westborough High		918			918
4500	Whitcliffe Mount B & E College		1246			1246

MAINTAINED ALL-THROUGH

4019	Almondbury Community School	277	243			520
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PRIMARY ACADEMIES

2049	Beaumont Primary Academy			253		253
2078	Birdsedge First			64		64
2060	Birstall Primary Academy			203		203
2002	Boothroyd Primary Academy			588		588
2053	Brambles Primary Academy			58		58
2063	Carlinghow JI&N			298		298
2000	Christ Church CE Academy			202		202
2047	Cowlersley Primary			144		144
2017	Diamond Wood Community Academy			319		319
2062	Field Lane JI&N			211		211
2124	Fieldhead Primary Academy			175		175
2051	Healey JI&N			358		358
2101	Heaton Avenue Primary			426		426
2055	Helme CE(VA) J&I			108		108
3411	Hillside Primary			306		306
3026	Lepton CE(VC) JI&N			197		197
3303	Lindley CE Infant			360		360
2048	Lindley Junior			496		496
2018	Marsden Junior			202		202
2126	Meltham Moor Primary			190		190
2022	Millbridge JI&N			288		288
2021	Netherton I & N			150		150
2058	New Mill Infant			122		122
2118	New Mill Junior			214		214
2070	Old Bank JI&N			148		148
2031	Orchard Primary Academy			313		313
2012	Overthorpe C of E Academy			251		251

**OCT 2019 PUPIL CENSUS: FOR CALCULATION OF SCHOOLS FORUM PRIMARY/SECONDARY,
MAINTAINED/ACADEMY PROPORTIONATE REPRESENTATION FOR ACADEMIC YEAR 2020/21**

DfE No	School	Maintained Primary pupils	Maintained Secondary pupils	Academy Primary pupils	Academy Secondary pupils	Total pupils [Yr R-Yr 11]
3327	Scissett CE(VA) Academy			179		179
2094	Shelley First			204		204
2082	Skelmanthorpe Academy			155		155
3328	St Aidan's CE(VA) Academy			170		170
2059	The Co-Op Academy Smithies Moor			289		289
2026	Thornhill J&I			366		366

SECONDARY ACADEMIES

4048	Batley Girls' High - Visual Arts College				1073	1073
4045	BBG Academy				954	954
5400	Castle Hall Academy				771	771
4004	Colne Valley High				1297	1297
5401	Heckmondwike Grammar				990	990
4038	Honley High				1282	1282
4000	King James's School				909	909
4002	Manor Croft Academy				831	831
4021	Moor End Academy				991	991
4013	Salendine Nook High				1362	1362
4049	Shelley College				1080	1080
4800	St John Fisher Catholic Vol Academy				939	939
4040	The Mirfield Free Grammar				1140	1140
4060	Thornhill Community Academy				891	891
4005	Upper Batley High				690	690

MIDDLE ACADEMIES

4054	Kirkburton Middle			173	342	515
4041	Scissett Middle			195	403	598

ALL-THROUGH ACADEMIES

4006	Royds Hall Community School			367	832	1199
6012	Batley Grammar School			210	771	981

TOTALS: **28,874** **7,444** **8,952** **17,548** **62,818**

PROPORTIONS OF THE TOTAL: 45.96% 11.85% 14.25% 27.93% 100.00%

5 1 1 3 10

May-19 **31,024** **8,530** **7,236** **15,926** **62,716**

49.47% 13.60% 11.54% 25.39% 100.00%

5 1 1 3 10

May-18 **31,786** **9,262** **6,575** **14,709** **62,332**

50.99% 14.86% 10.55% 23.60% 100.00%

5 2 1 2 10

May-17 **32,262** **9,056** **5,992** **14,232** **61,542**

52.42% 14.72% 9.74% 23.13% 100.00%

5 2 1 2 10

May-16 **33,052** **10,022** **4,394** **13,245** **60,713**

OCT 2019 PUPIL CENSUS: FOR CALCULATION OF SCHOOLS FORUM PRIMARY/SECONDARY, MAINTAINED/ACADEMY PROPORTIONATE REPRESENTATION FOR ACADEMIC YEAR 2020/21
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DfE No	School	Maintained Primary pupils	Maintained Secondary pupils	Academy Primary pupils	Academy Secondary pupils	Total pupils [Yr R-Yr 11]
		54.44%	16.51%	7.24%	21.82%	100.00%
		5	2	1	2	10

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DEDICATED SCHOOLS GRANT AND OTHER SCHOOL FUNDING CHANGES FOR FUNDING YEAR 2021-22

SCHOOLS FUNDING BLOCK

- The core National Funding Formula factor values will increase by an average 3% in 2021-22 in comparison to 2020-21 factor values (which showed a 4% increase upon 2019-20)
- There are some notable exceptions to that general increase in terms of basic entitlement funding, IDACI funding and the minimum per pupil funding levels that have to be satisfied – see the accompanying table which compares the 2021-22 factor values with the 2020-21 values.
- From 2021-22 both the Teachers' Pay Grant (TPG) and the Teacher's Pension Employer Contributions Grant (TPECG) will cease and the grant funding will be moved into the DSG. [Teachers Pay Grant has been supporting the difference in the last two teachers' pay awards between the actual pay uplift and the 2% uplift schools budgeted for. The Pension Employer Contributions Grant addressed the last hike in the employer contribution rate for teachers from 16.4% to 23.6%] **It is not clear yet whether the funding figures will be amended to include the impact of the September 2020 teachers' pay offer being greater than 2%.**
- For the basic entitlement funding – the **Age-Weighted Pupil Units** – the 2021-22 Primary value will include £180 on top of the 3% rise to reflect the transfer in of TPG and TPECG monies. Similarly, the KS3 and KS4 AWPU values will both include £265 on top of the 3% rise.
- The **Minimum per Pupil funding** values for 2021-22 also reflect the transfer in of TPG and TPECG funds to ensure that the intended underlying improvements to funding for some schools are unaffected. For Primary schools the expected increase in the minimum level from £3,750 to £4,000 per pupil has been enhanced to £4,180 in 2021-22. For Secondary schools the 20-21 minimum value of £5,000 will increase to £5,150 in 2021-22 and £265 is added on top from the transfer of TPG and TPECG funds.
- There are significant changes to the structure of the **IDACI (Income Deprivation Affecting Children Index)** factors for 2021-22. This is due to a move to adopt the September 2019 IDACI data set from FY 2021-22 onwards. In order to avoid a potential repeat of the turbulence that happened the last time the IDACI statistics were updated, the 2021-22 IDACI banding factor values show some marked differences when compared to 2020-21. The numbers of children assigned to each band will be handled via a ranking process rather than by use of pure IDACI scores. These changes will ensure that the allocation total remains within the national IDACI budget provision. [Further testing of the impact on Kirklees schools will be undertaken once the draft 21-22 modelling tool is received].
- The **Minimum Funding Guarantee** for 2021-22 can be set within the range +0.5% to +2.0%. The National Funding Formula assumes that every school will see at least a 2% increase in funding per pupil for funding year 2021-22. With the 3% average increase in formula factor values, it stands to reason that the amount of cash protection allocated on top of the NFF for many schools will once again show a reduction next year as a consequence. The TPG and

TPECG amounts will be added to each School's 2020-21 funding baseline so that they don't distort the 2% minimum increase calculation.

- Application of the 2021-22 funding factor values to the current year's data set results in a Schools Block allocation to Kirklees of £325m which compares to the 2020-21 allocation of £302.2m – an increase of £22.8m (a 7.54% increase). The transfer in of former TPG and TPECG monies accounts for £13.6m (4.50%) of this increase. The actual School Block allocation for 2021-22 will largely be based upon October 2020 pupil census data.
- The £325m illustrated Schools Block figure for 2021-22 excludes pupil growth funding [£1.59m in 2020-21]. This will be calculated by comparing the October 2020 census with the October 2019 census at school level and mapping only the increases in numbers on roll. £1,455 will be allocated per pupil for Primary increases and £2,175 for Secondary increases.
- Local authorities can once again in 2021-22 propose to move up to 0.5% of their Schools Block allocation with the permission of the Schools Forum. The transferring TPG and TPECG funds would fall outside the calculation. Local authorities would have to appeal to the Secretary of State in cases where a transfer of more than 0.5% is proposed or the Forum rejected the proposal.
- It is confirmed that academies will continue to receive both TPG and TPECG funding through to 31st August 2021 as they won't benefit from the increases to the NFF factor values until September 2021.
- The ESFA is considering making further changes to the NFF to support small and remote schools from 2022-23. The proposals will form part of a public consultation round.
- Plans are to be announced to move to a 'hard' National Funding Formula probably with effect from FY 2022-23, meaning all schools in all local authorities will be directly funded by the NFF factors. Whether there will still be local discretion over the premises allocations remains to be seen. There will be a further consultation launched about this change.

CENTRAL SCHOOLS SERVICES BLOCK

- The illustrated 2021-22 CSSB pupil-led figure is £2.074m which is slightly lower than the £2.082m received in 2020-21.
- In addition there is a historic commitment element which, for Kirklees, relates to ongoing DSG pension commitments. This has again been cut by 20% for 2021-22 but because Kirklees' commitments relate to pension costs which won't reduce in the near future the ESFA should again restore the initial £34k cut that has been applied.
- The actual 2021-22 CSSB allocation will also include a transferred amount of TPECG in respect of the local authority's centrally-employed teachers.

HIGH NEEDS BLOCK

- The final High Needs Block allocation to Kirklees for 2020-21 was £43.09m. The illustrated allocation for FY 2021-22 is £48.68m, an increase of £5.59m. This figure will only change

slightly when the actual allocation is declared due to updates to pupil numbers at the next census point.

- As with the Schools Block, the illustrated figure for the 2021-22 High Needs Block includes an element of funding transferred from the Teachers Pay Grant and the Teachers Pension Employer Contribution Grant. Previously the funding received for the basic needs of children attending Special Schools was set at £4,000 per pupil. From 2021-22 this will increase to £4,660 with the additional £660 representing the transferred in TPG and TPECG funding.
- The transferred TPG and TCEPG funds total £566.1k for Special schools and £81.8k for Alternative Provisions. The final settlement will also include Supplementary Pension Grant for a number of these providers (where the actual cost of the pension increase outweighed the funding provided by the basic TPECG). There is an expectation that the Council will acknowledge these former grant amounts in the budget share allocations made to specialist providers in 2021-22.
- Setting aside the TPG and TPECG transfers, the remaining £4.94m increase in funds for 2021-22 represents the maximum 12% increase per head of population that a Council can gain for next year.
- Looking further ahead, the updated uncapped National Funding Formula outcome for Kirklees has been revised to now stand at £55.24m, so there is the prospect of a further gain in High Needs funding of £6.56m beyond 2021-22. There is no detail yet as to when/how quickly these funds will flow to the Council. The £55.24m is broken down in the table below.

Funding element	Children counted	Allocation
Pupils in Special schools (basic entitlement) includes TPG/TPECG of £0.57m)	857.5	£4.00m
Historic High Needs spending element		£15.42m
0 to 18yrs Population factor	96,197	£17.49m
Free School Meals		£4.26m
IDACI (now September 2019 statistics)	45,856	£3.76m
Children in bad health	604	£2.94m
Disability factor	2,811	£2.01m
Low Prior Attainment at Key Stage 2	903	£2.93m
Low Prior Attainment at Key Stage 4	1,160	£2.76m
Alternative Provision TPG & TPECG transfer		£0.08m
Pupil Import/Export adjustment	-(68)	-(£0.41)m
Total High Needs NFF outcome		£55.24m

[NEW] COVID-19 CATCH-UP PREMIUM

- £650m has been allocated nationally to support the task for schools of helping their pupils catch up on missed education due to the Covid-19 lockdown. The new Covid-19 catch-up premium will allocate funds to schools for the academic year 2020/21 only.

- The allocation will be made for pupils from Reception to Year 11. Mainstream schools will get £80 per pupil whereas Special schools will receive £240 for each Planned Place.
- Schools will receive the catch-up premium in three instalments during the coming academic year but schools should plan to use the full allocation in the certain knowledge that the funding allocations will be made. For mainstream schools £46.67 per pupil will be allocated in the current financial year with the remaining £33.33 per pupil allocated during the Summer term of 2021.
- Ofsted will have the power to check how schools are using the Catch-up Premium funding. Further guidance for schools about its use will be produced by the Education Endowment Foundation.

[NEW] NATIONAL TUTORING PROGRAMME

- £350m has also been allocated nationally to set up a tutoring programme to support the catch-up. The programme will cover 5 to 16 year olds and 16 to 19 year olds in sixth forms and colleges.
- The programme is due to start in the second half of the Autumn term 2020. A portal will be provided for schools to register their interest in participating. Schools can use their catch-up premium to pay for the subsidised charges
- There will be an approved list of tuition partners for schools to access from November 2020.
- Schools serving the most disadvantaged areas will be supported to employ in-house academic mentors to provide small group tuition to pupils needing it.

OTHER ISSUES

- If any maintained schools join the **Risk Protection (insurance) Arrangement** a recoupment deduction for the RPA charge will be made by the ESFA from the DSG Schools Block. There is therefore a need to agree a new de-delegation factor to cover the RPA to be able to deduct the recouped RPA amount from the school(s) concerned.
- **Deficits carried forward in the DSG account.** Now that the High Needs Block deficit shows on the DSG balance sheet we can expect some engagement with the DfE about plans to deal with the debt. The new guidance elaborates a bit more about the approach to be taken...

“... the DfE recognises that there may well be some authorities which, despite their best efforts, will still not be able to pay off their historic deficit from the DSG over the next few years. In these cases, the DfE expects to work together with the local authority to agree a plan of action to enable the local authority to pay off its deficit over time. The department will need convincing evidence from the local authority that it would be impracticable to pay off a historic deficit from the DSG it would expect to receive in future years. The department will discuss the evidence requirement with selected local authorities and provide a template to assist all local authorities report (sic) their DSG balance.”

- Deficit discussions will begin during 2020 and will initially be limited to a fairly small number of local authorities. Other local authorities will be contacted during 2021-22 and subsequent years. The scale of the deficit would presumably dictate when engagement with the local authority would commence.
- As part of an appropriate agreed package of measures in a deficit recovery plan the department will, if necessary, make funds available from within the overall total of DSG so that the local authority can pay off its deficit over time.
- The Department is also concerned about the effect that a large deficit could have upon a local authority's cash flow. If an authority is able to prove that it is facing cash-flow problems specifically because of the DSG deficit the department will consider providing an advance of funding which would then be subtracted from the authority's future years' DSG allocations.

David Gearing 23/07/20

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DSG outturn 2019/20

	DSG grant 19/20	Rollover from 18/19	estimated EY adjust for census	Adjusted budget 19/20	DSG outturn	Variance
	£k	£k	£k	£k	£k	£k
Learning						
TQI	34.0			34.0	34.0	0.0
Schools Forum Commissioning	242.6			242.6	242.6	0.0
Learning Early Years	585.0			585.0	585.0	0.0
2 Year Old Funding	3,989.4			3,989.4	3,952.3	-37.1
PVI Formula Funding - 3&4 year olds	16,672.2	506.0	301.7	17,479.9	16,585.3	-894.6
Disability Access Fund	33.6			33.6	6.8	-26.8
Traded Learning Service	82.0			82.0	23.6	-58.4
International New Arrivals	69.0			69.0	69.0	0.0
Portex, Portage & ICAN	131.6			131.6	131.6	0.0
Specialist Provision Co-ordination	758.3			758.3	413.5	-344.8
Education of Looked After Children	20.0			20.0	20.0	0.0
Resources for Statements in Mainstream	230.0			230.0	276.7	46.7
SEN Assessment & Commissioning	165.0			165.0	165.0	0.0
Schools Organisation & Planning	131.0			131.0	131.0	0.0
School Admissions	389.0			389.0	389.0	0.0
SLAs	169.0			169.0	169.0	0.0
	23,701.7	506.0	301.7	24,509.4	23,194.4	-1,315.0
School Budgets						
FE High Needs allocation	804.8			804.8	4,238.6	3,433.8
BESD and Exclusions	855.4			855.4	-847.8	-1,703.2
Independent School Fees	2,513.0			2,513.0	6,385.1	3,872.1
ISB & ISSB	221,808.3			221,808.3	221,808.3	0.0
School balances	-9,457.6			-9,457.6	-9,457.6	0.0
Pupil Premium Grant	-12,039.0			-12,039.0	-12,039.0	0.0
Early Years Pupil Premium	196.7			196.7	173.0	-23.7
Year 7 Catch Up Premium	-202.2			-202.2	-202.2	0.0
EFA 6th Form Grant	-590.4			-590.4	-590.4	0.0
LMS Contingency	2,118.6			2,118.6	2,118.6	0.0
SEN Contingency	4,887.1			4,887.1	12,725.6	7,838.5
Cover	0.0	-124.7		-124.7	69.0	193.7
Maternity Leave	1,218.1			1,218.1	1,216.4	-1.7
Public/Union	198.9			198.9	336.2	137.3
Schools Forum	31.0			31.0	1.7	-29.3
School Reorganisations	292.0	-113.2		178.8	195.4	16.6
Premature Retirements	180.4			180.4	180.4	0.0
Protection of Employees	0.0			0.0	0.0	0.0
Copyright Licences	323.5			323.5	323.5	0.0
PPP1	-2,184.4			-2,184.4	0.0	2,184.4
PPP2	276.0			276.0	170.4	-105.6
Finance Service / HR / Catering SLAs	307.8			307.8	205.5	-102.3
ESG retained duties	943.3			943.3	943.3	0.0
	212,481.3	-237.9	0.0	212,243.4	227,954.0	15,710.6
Total	236,183.0	268.1	301.7	236,752.8	251,148.4	14,395.6

High Needs	12,876.8	
Early Years	-982.2	
Schools Block / CSS Block	316.6	
PPP1 council funding	2,184.4	carried forward
	14,395.6	

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SCHOOLS BLOCK NATIONAL FUNDING FORMULA FACTORS FOR 2021-22

NFF Factor	Description	2020-21 amount	2021-22 amount	Change	%age	Notes
Basic Entitlement, Age-Weighted Pupil Unit (AWPU)	Primary (Years R-6)	£2,857.00	£3,123.00	£266.00	9.31%	3% rise + £180 re transfer in of Teachers Pay & Pension Grants
	Key Stage 3 (Years 7-9)	£4,018.00	£4,404.00	£386.00	9.61%	3% rise + £265 re transfer in of Teachers Pay & Pension Grants
	Key Stage 4 (Years 10-11)	£4,561.00	£4,963.00	£402.00	8.81%	3% rise + £265 re transfer in of Teachers Pay & Pension Grants
Deprivation factors	Primary FSM Current	£450.00	£460.00	£10.00	2.22%	From 2021-22 the IDACI funding distribution will use the IDACI 2019 national statistics. To avoid the turbulence that occurred last time the IDACI post code data changed, the ESFA has changed the Bands to be based on 'ranks' rather than pure IDACI scores. This means that Band A will count children living in the most deprived 2.5% of Lower Super Output Areas, Band B the next most deprived 5% of LSOAs, Band C the next most deprived 5% etc (Bands E and F are set at 10%). 62.5% of LSOAs are classed as Band G where deprivation levels are low and do not require additional funding support. The differential increases in Band values for 2021-22 are a direct consequence of the new ranked approach which is intended to minimise shifts in IDACI funding for schools between the two years.
	Secondary FSM Current	£450.00	£460.00	£10.00	2.22%	
	Primary FSM Ever6	£560.00	£575.00	£15.00	2.68%	
	Secondary FSM Ever6	£815.00	£840.00	£25.00	3.07%	
	Primary IDACI Band F	£210.00	£215.00	£5.00	2.38%	
	Primary IDACI Band E	£250.00	£260.00	£10.00	4.00%	
	Primary IDACI Band D	£375.00	£410.00	£35.00	9.33%	
	Primary IDACI Band C	£405.00	£445.00	£40.00	9.88%	
	Primary IDACI Band B	£435.00	£475.00	£40.00	9.20%	
	Primary IDACI Band A	£600.00	£620.00	£20.00	3.33%	
	Secondary IDACI Band F	£300.00	£310.00	£10.00	3.33%	
	Secondary IDACI Band E	£405.00	£415.00	£10.00	2.47%	
	Secondary IDACI Band D	£535.00	£580.00	£45.00	8.41%	
	Secondary IDACI Band C	£580.00	£630.00	£50.00	8.62%	
	Secondary IDACI Band B	£625.00	£680.00	£55.00	8.80%	
Secondary IDACI Band A	£840.00	£865.00	£25.00	2.98%		
English as an Additional Language (EAL)	Primary EAL	£535.00	£550.00	£15.00	2.80%	
	Secondary EAL	£1,440.00	£1,485.00	£45.00	3.13%	
Pupil Mobility	Primary Mobility	£875.00	£900.00	£25.00	2.86%	
	Secondary Mobility	£1,250.00	£1,290.00	£40.00	3.20%	
Prior Attainment	Primary low attainment	£1,065.00	£1,095.00	£30.00	2.82%	
	Secondary low attainment	£1,610.00	£1,660.00	£50.00	3.11%	
Lump Sum	All mainstream schools	£114,400.00	£117,800.00	£3,400.00	2.97%	Kirklees' Lump Sum value for 2020-21 is £120,814
Minimum per pupil funding values	Primary	£3,750.00	£4,180.00	£430.00	11.47%	£4,000 + £180 re transfer in of Teachers Pay & Pension Grants
	Key Stage 3	£4,800.00	£5,215.00	£415.00	8.65%	£4,950 + £265 re transfer in of Teachers Pay & Pension Grants
	Key Stage 4	£5,300.00	£5,715.00	£415.00	7.83%	£5,450 + £265 re transfer in of Teachers Pay & Pension Grants
	Secondary	£5,000.00	£5,415.00	£415.00	8.30%	£5,150 + £265 re transfer in of Teachers Pay & Pension Grants

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