



## **London Borough of Hammersmith & Fulham**

### **SCHOOLS FORUM**

**Tuesday 14th March 2023**

### **Update: Schools Block Budget 2023/24**

**Open**

**Classification - For Scrutiny Review & Comment**

**Key Decision: No**

**Wards Affected: (All Wards); All**

### **Agenda Item 2**

**Accountable Director:** Jacqui McShannon, Strategic Director of Children's Services

Report Authors:

Tony Burton

Head of Finance for Children's Services and Education

## **Purpose of the report**

This report confirms the funding allocations proposed for individual schools' budget shares for the April 2023 to March 2024 period and agreed by Schools Forum in January 2023 have now been confirmed by the ESFA (28 February 2023) and formally approved by local authority cabinet decision on 6th March 2023.

This report proposes the indicative allocations of the available falling rolls funding agreed by Schools Forum for all mainstream schools (maintained and academy/free schools) the 2023/24 budget of £200,000 in line with funding regulations following October 2022 census and expressions of interest for funding support.

## **1. Introduction**

- 1.1. Following Schools Forum approval of the 2023/24 Authority Proforma Tool (APT) in January 2023, the budget proposals were agreed by Hammersmith and Fulham and for formal approval by Cabinet on 6<sup>th</sup> March 2023. The ESFA confirmed their approval of the APT with Ministerial agreement of the 1% block transfer to support the High Needs Block on 28th February 2023.
- 1.2. All mainstream schools had their delegated budgets for 2022/23 (April to March) financial year confirmed by email on 28<sup>th</sup> February 2023 in line with statutory guidance.
- 1.3. Academies and Free Schools were also informed of their APT budget shares for the April 2022 to March 2023 period which is subject to recoupment by the ESFA.
- 1.4. Section 2 of this paper sets out the proposed indicative allocations of falling rolls funding yet to be distributed to mainstream schools from the agreed 2022/23 £200,000 fund.

## **2. Falling Rolls Allocations Proposed**

- 2.1. There is a fund of £0.200m from the 2023/24 budget with respect to roll falls between October 2021 and 2022 census dates approved at the January 2023 Schools Forum.

- 2.2. ESFA guidance states that the local authority may set aside schools block funding to create a small fund to support good schools with falling rolls where local planning data shows that surplus places will be needed within the next three years.
- 2.3. The ESFA advise that the allocation of falling rolls funding should contain clear objective trigger points for qualification and a clear formula for calculating allocations.
- 2.4. The criteria agreed at January 2023 Schools Forum for the 2023/24 falling rolls funds are detailed below:
- The fund is available to all mainstream schools (maintained, Academy and Free Schools) subject to the points below.
  - Key trigger point is reached for falling rolls support. The fall in roll is more than 3% year on year between October 2021 and October 2022 census points.
  - An Ofsted category of Good or Outstanding (Mandatory per the regulations).
- 2.5. Eligible schools must evidence the impact of the roll fall on the school and the actions taken to adjust to a lower role or clear plan to recover the roll based on clear planning data agreed by the LA:
- surplus capacity exceeds a minimum number of pupils, or a percentage of the published admission number
  - local planning data shows a requirement for a minimum percentage of the surplus places within the next three years
  - formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort
  - the school will need to make redundancies in order to contain spending within its formula budget
- 2.6. Schools were asked for expressions of interest for falling rolls funding as part of the Autumn 2022 schools budget consultation. Responses suggested there was a demand for financial support for falling rolls in line with the criteria agreed and outlined in paragraphs 2.3 and 2.4 above.
- 2.7. There are 9 schools with year-on-year roll falls over the 3% trigger point who are eligible to apply for falling rolls support. Education Finance have written to these schools asking for applications for financial support from the fund up to the value of the indicative allocations detailed in Table 1, and per the calculations detailed in Appendix 1.
- 2.8. The table below details the maximum level of funding expected to be available to any individual school. Indicative allocations are calculated on unit value of

- 2.9. **Schools Forum are asked to agree payments up to the indicative allocations subject to approval by the Schools' Forum subgroup following review of requests for support.**

Table 1 – Proposed Indicative Allocations by School for Roll Falls over 3%

<b>School Name</b>	<b>Indicative Allocation 2023/24 £</b>
Addison Primary School	30,233
Kenmont Primary School	4,651
Old Oak Primary School	16,279
Sir John Lillie Primary School	41,860
St Mary's Catholic Primary School	20,930
St Paul's CofE Primary School	2,326
St Thomas of Canterbury RC Primary School	30,233
Fulham Primary School	30,233
Sullivan Primary School	23,256
<b>Total</b>	<b>200,000</b>

- 1.1. For context and as requested by Schools Forum, a summary of Falling Rolls payments agreed since 2019/20 are detailed in Appendix 2, alongside the indicative allocations for 2023/24.
- 1.2. Schools interested in putting forward a case for financial support should understand that submissions will be reviewed by a subgroup of the Schools Forum who may also take into consideration:
- Evidence of a sustainable budget plan over the medium term
  - Availability of retained school or trust balances to support the roll fall
  - The receipt of previous support from Falling Rolls since 2019/20
- 1.3. The timeline for process:
- 15<sup>th</sup> March 2023 – Final requests for Falling Rolls support requested from 9 Schools with 31<sup>st</sup> March deadline.
  - Late April 2023 – Convene Falling Rolls subgroup for review of requests and decision to approve or decline.
  - May 2023 – payments for approved funding made
  - June 2023 Schools Forum - Report back to Schools Forum on funding agreed or unallocated.

**Report End**

# Appendix 1 - Basis for Calculation of Indicative Funding Available – Subject to Application

School Name	Final NOR October 2021	Final NOR October 2022	Change in Roll	Percentage reduction in roll Oct 22 - Oct 21	Reduction over 3%	Roll Fall Over 3%	Indicative Allocation £ (£2,226 per pupil over 3%)
Addison Primary School	244	224	-20	-8.20%	-5.20%	-13	30,233
Kenmont Primary School	178	171	-7	-3.93%	-0.93%	-2	4,651
Old Oak Primary School	198	185	-13	-6.57%	-3.57%	-7	16,279
Sir John Lillie Primary School	253	227	-26	-10.28%	-7.28%	-18	41,860
St Mary's Catholic Primary School	168	154	-14	-8.33%	-5.33%	-9	20,930
St Paul's CofE Primary School	187	180	-7	-3.74%	-0.74%	-1	2,326
St Thomas of Canterbury Catholic Primary School	149	132	-17	-11.41%	-8.41%	-13	30,233
Fulham Primary School	254	233	-21	-8.27%	-5.27%	-13	30,233
Sullivan Primary School	188	172	-16	-8.51%	-5.51%	-10	23,256
<b>Total</b>							<b>200,000</b>

## Appendix 2 – Falling Roll Payments Since 2019/20 (including 2023/24 Indicative)

	2019/20	2020/21	2021/22	2022/23	2023/24 Indicative	Total
School	£	£	£	£	£	£
Addison Primary School			19,494	21,362	30,233	71,089
All Saints C Of E Primary School				10,818		10,818
Ark Bentworth Primary Academy		9,643		1,540		11,183
Ark Swift Primary Academy	25,458	36,810	24,902	12,927		100,097
Brackenbury Primary School			11,472	19,341		30,813
Flora Gardens Primary School			5,199	11,289		16,488
Fulham College Boys' School	22,890	11,454				34,344
Fulham Primary Academy	16,227	453			30,233	46,912
Holy Cross Primary School				8,111		8,111
John Betts Primary School		30,943				30,943
Kenmont Primary School			3,305	6,179	4,651	14,135
Miles Coverdale Primary School			5,792			5,792
Normand Croft Community School			674			674
Old Oak Primary School	8,858	56,222	40,722	16,056	16,279	138,137
Phoenix Academy	25,000					25,000
Queens Manor Primary Academy	1,191	9,690				10,881
Sir John Lillie Primary School			10,638	3,021	41,860	55,519
St Mary's Catholic Primary School		281	2,182	7,425	20,930	30,818
St Paul's CofE Primary School		47	17,986		2,326	20,359
St Thomas Of Canterbury Catholic Primary		36,764	31,271	35,575	30,233	133,842
St Johns Ce Primary School			5,134	2,570		7,704
Sullivan Primary Academy		2,091		12,515	23,256	37,862
Wendell Park Primary School				23,474		23,474
Wormholt Park Primary School		28,603	21,227	7,798		57,627
<b>Total Paid</b>	<b>99,624</b>	<b>223,000</b>	<b>199,999</b>	<b>200,000</b>	<b>200,000</b>	<b>922,623</b>

