

## SCHOOLS FORUM MEETING – 12<sup>th</sup> JANUARY 2022

### Updated Schools Growth Fund Procedure

#### Introduction

The purpose of this note is to recommend, subject to any comments Schools Forum may have, an updated procedure to be adopted in accessing additional funding where the Local Authority requests a maintained or academy primary or secondary school to increase its PAN and this results in additional pupil numbers over and above those funded at the previous count. This procedure is being revised following the discussion on this item at the last school's forum in respect of the re-introduction of this fund and the need to ensure that the limited resources are used where needed most.

#### Background

The previous procedure has been largely retained with one or two additional criteria

The Growth Fund will operate on the following principles:

- ensuring that such a fund is ring fenced to be used on growth funding only.
- that Schools Forum approves the creation of such a fund.
- the fund is available for the benefit of both recoupment academies and maintained schools.
- any funds remaining at the end of the financial year must either be added to the following years DSG and re-allocated to academies and maintained schools through the local formula or rolled forward to be used to support growth
- criteria to access the fund are produced and approved by the School Forum.
- the basis of payment clearly defined.
- Awards are made for one year only and will be reviewed each year in accordance with the criteria.

#### Criteria to be met

In order for the contingency to be accessed then it is proposed that the following five criteria are met:

1. The increase in PAN must have been requested by the Local Authority as part of its strategic place planning role. Note this fund **CANNOT** be used to support lagged funding.
2. The increase in pupil numbers must materialise and must take pupil numbers in excess of those funded at the previous October count.

3. Where the increase in pupil numbers is 5 or less then no adjustment will be made.
4. In agreeing to fund any increase in pupil numbers then for clarity the first 5 pupils will be deemed to be funded by the school and will be excluded from the calculation for re-imburement.
5. Schools must be able to demonstrate that they are unable to fund the request themselves. As part of this assessment reliance will be placed on the level of reserves held and where these are in excess of the former 8% amount (primary) and 5% (secondary). Where the school is maintained reference will be made to the school budget plan, where the school is an academy evidence such as system management accounts showing the projected outturn position and reserves position will be required as a minimum.

### **Applications**

Applications should be made by the 30<sup>th</sup> November. This will allow validation checks of the school census data to have been received and confirmed by the school.

### **Rate of re-imburement**

The rate of re-imburement proposed is to use the relevant NFF AWPU value.

### **Payment process**

On receipt of an application and the final APT in December applications will be considered and for those meeting the criteria payment made in the following January

### **Effective Date**

The proposed effective date is the 1<sup>st</sup> September 2022.

### **Recommendation**

We would request Schools Forum to approve the above revised procedure in respect of the eligibility criteria to access this new growth fund.

We would also recommend that this procedure is reviewed in 12 months at the latest.

Contact Officer: David Kirven, Strategic Lead – Finance Business Partnering

