

Barnsley BMC – Pupil Growth Fund

Document Revision History

Year of revision	Author / Editor	Notes	Date of approval
2013	Joshua Amahwe	Original document approved by the School Forum Effective date of 1 April 2014	February 2013
2016 v1	Joshua Amahwe	Criteria of the fund updated to provide minimum funding protection to schools and one-off funding for resources, equipment, etc. Effective date of 1 April 2016	February 2016
2016 v2	Joshua Amahwe	Criteria updated to include specific reference to secondary schools; provide recurrent funding for permanent PAN and bulge classes for 7 years; and reference to new schools. Effective date 1 April 2017.	October 2016

Pupil Growth Fund – Process / Criteria

Introduction

Many local authorities are facing significant pupil number growth. In Barnsley, funding pressures relating to increased admission numbers at the start of the academic year are currently managed through the schools' contingency budget. However, one of the reforms to the school funding system in 2013 is to enable local authorities to create a pupil growth fund from DSG, in advance of allocating budget shares to schools. The growth fund can be used to support schools which are required to provide extra places in order to meet basic need and cannot be used to support schools in financial difficulty or general growth due to popularity of the school.

The establishment of the Growth Fund in Barnsley was necessitated by pupil number forecasts produced by the Schools Admissions and Organisation team (based on data from the Office of National statistics on local births) that indicate an increase in the birth rate in Barnsley. This was expected to continue for many years - the effect will be an increase in the number of Barnsley children requiring a primary school place.

In areas of the borough identified as having a shortage of reception class places, School Admissions officers have been working in partnership with head teachers to ensure existing teaching spaces have been fully utilised or additional capacity added to the school.

It should be noted that the Growth Fund is intended to address shortage of school places in the short term. Ongoing / increasing capacity issue in a localised area may need to be addressed permanently through a new build or school. It should be noted that S37 of the Education Act 2011 has made changes to the previous legislation in relation to the statutory process for establishing new schools. There is a presumption that any new school will be an academy / free school, and as such local authorities will need to seek powers to establish these schools.

Underlying Principles

Councils are allowed to top-slice the Dedicated Schools Grant (DSG) in order to create a Growth Fund to support schools where additional places have been created to address basic need issues. The following principles would underpin the operation of the Growth Fund in Barnsley:

- Can only be used for supporting growth in pre-16 pupil numbers (i.e. primary and secondary phases) to meet the basic need and to support additional classes needed to meet the infant class size regulations.

- The Growth Fund can equally be used to meet the cost of new schools. These will include the lead-in costs for goods or services necessary in order to admit pupils. It can also include post start-up costs and any diseconomy of scale costs.
- Must be used on the same basis for the benefit of both maintained schools and recoupment academies.
- Any unspent funds remaining at the end of the financial year should be reported to the Schools Forum. Funding may be carried forward to the following funding period as with any other centrally retained budget and can be added to the growth fund if the Council wishes.
- Local authorities will be required to produce criteria on which any growth funding is to be allocated; it should set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid.
- School Forum approval of the criteria will be required before the allocation of the growth fund to schools. Consultation with the School Forum is necessary on the total sum to be top-sliced from each phase and it must be regularly updated on the use of the funding.

Funding Allocation

At its last meeting of 21st February 2013, School Forum gave its support to the initial establishment of a pupil growth fund, with £200k being set aside based on an indicative assessment of the projected surplus places across Barnsley and the level of revenue funding (based on AWPU per pupil amount) that may be made available to those schools that have agreed (with the authority) to an increase in their admission numbers or to the creation of bulge classes.

The Growth Fund was formally increased to £300k for 2016/17 to address increasing demand for school places in particular areas of the borough. Subsequent to this decision, the Schools Forum has given further approval for the uncommitted balance on the 2015/16 carry forward DSG of £66k to be added to and to supplement the Fund (on a non-recurrent basis) to help deal with identified growth pressures in 2016/17.

Applicable Criteria

It is proposed that the following criteria are applied to the Growth Fund in Barnsley:

1. Growth Fund will apply to primary and secondary school phases (including academies);
2. The Growth Fund is only applicable to meet additional revenue costs of increased pupil intake and therefore cannot be used to meet capital related expenditure as any such costs will be funded separately from the capital programme/budget
3. It will only be awarded to schools or academies **that have agreed with the authority:**
 - to provide an extra class in order to meet basic need in the area (either as a bulge class or as an on-going commitment). This may or may not include the internal re-modelling to maximise existing accommodation or building new accommodation;
 - to accept a change and has increased their published admission numbers (PAN) either temporarily (in the case of a bulge class) or permanently;
 - to take additional intake of pupils where overall pupil numbers would require the school to employ an additional teacher subject to agreement of the authority).
4. If the above criteria is satisfied, the allocated funding to the school or academy will be determined as follows:
 - the equivalent AWPU value multiplied by the actual number of pupil intake, pro-rated from September (i.e. 7 months);
 - in the case of a permanent increase in admission or continuing bulge class throughout the year groups, pro-rata AWPU funding would be provided annually for 7 years from date of increased capacity. The annual allocated funding will be based on actual intake and will include consideration of the number of Y6 pupils leaving the school in that year.
 - additional one-off funding of £5000 for materials, resources and equipment for bulge classes (for the first year only)
 - In the event where actual pupil intake is less than anticipated a minimum funding based on 10 pupils would be provided plus an additional one-off £2500 for materials, resources or equipment (for the first year only)

5. For the avoidance of doubt no growth funding would be allocated in the following circumstances:
- Where there is no prior agreement or consultation with the authority in respect of the additional school places;
 - the school has surplus places and then takes additional children up to the pupil admission number
 - Admits over their pupil admission number at their own choice without agreement from the authority
 - Is directed and/or requested to admit additional pupils as a result of errors, appeals, fair access panel, SEN, LAC etc and aren't required to set up an additional class or employ additional resource
6. Where a **new** school or academy is established in response to basic need for pupil places, one-off funding will be made available in recognition of costs incurred before the school opens.
7. In addition to the above, consideration may be given to support diseconomies of scale when a new school or academy opens without a full complement of year groups. The support arrangements to be negotiated and agreed with the new school.