
Growth Fund 2022/23 Payments

Report being considered by: Schools Forum on 23 January 2023

Report Author: Melanie Ellis

Item for: Decision **By:** All School representatives

1. Purpose of the Report

1.1 To inform the School's Forum of payments recommended to be made to schools from the Growth Fund budget in 2022/23.

2. Recommendation

2.1 To approve the payment of £38.8k to The Calcots and £125.2k to Trinity School

Will the recommendation require the matter to be referred to the Council or the Executive for final determination?	Yes: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>
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3. Introduction

3.1 Growth funding is allocated by the Department for Education (DfE) by formula and forms part of the Schools Block DSG allocation. The funding can either be used to form a growth fund, or it can be added into the school formula. The Schools Forum must be consulted on the total size of the growth fund and criteria for use.

3.2 The purpose of the growth fund is to support maintained schools and academies which are required to provide extra places in order to meet basic need within the authority, and to meet the cost of new and reorganised schools including pre-opening and diseconomy costs. It can also fund schools where very limited pupil number growth requires an additional class as set out by infant class size regulations. It cannot be used for general growth in pupil numbers.

3.3 The growth fund is also to support new schools with pre-opening costs and diseconomies of scale.

3.4 Following the receipt of the final October 2022 Census data, all schools were invited to make a funding request if they felt that their circumstances met the growth fund criteria. To support their applications, schools were asked to submit information regarding increases in class and teacher numbers between the two academic years.

Growth Fund 2022/23

Only growth in relation to basic need requirements in the area (and thus increases in PAN or bulge years approved by the local authority for this purpose) qualifies for this funding.

4. Applications Made 2022/23

- 4.1 Four schools applied for growth funding with two of these, Trinity & The Calcots, meeting the criteria.
- 4.2 The basis of The Calcots application is 'infant class size regulations'. In agreement with WBC the PAN was planned to reduce from 77 to 60 at September 2022. However, WBC admissions subsequently requested that the school maintain their intake at 77 for this academic year (2022/23). The impact of this is that the school is required to operate with 3 reception classes rather than the planned 2. The need for this additional class is reflected in not just the reception pupil numbers but also in the total pupil numbers, increasing overall the class requirement from 8 to 9.
- 4.3 For the academic year 2022/23 Trinity have been required to accommodate a bulge year, with an increase of 60 students in year 7. This is to meet basic need in the area. The increase in pupil numbers at Trinity has impacted upon the curriculum structure and support staff requirements. Trinity have been required to employ an additional member of English staff, an extra teacher to teach Maths and Science and an HLTA in Maths to support the extra numbers. These additional costs total £125,170.

5. Payments 2022/23

- 5.1 The Interim Head of Education is satisfied that the relevant criteria have been met at both schools and, therefore, recommends approval to the Schools Forum. The proposed payment totals £163,962, covering the period Sept 2022 – Aug 2023.
- 5.2 Growth funding for infant class size is £66,500. For maintained schools, there is a funding lag period of 7 months, between September and March. Therefore, the payment to The Calcots is £38,791.67 (7/12ths of £66,500)
- 5.3 Funding of up to £98,500 is available for secondary schools for each additional class. Academies' financial year runs from September to August, therefore, academies receive a full 12 months of growth funding. The payment of £125,170 will be paid to Trinity in two instalments, 7/12ths to cover the period Sept – March and the remaining 5/12ths to be paid in April. This additional 5/12ths element will be reimbursed by ESFA to the LA's Dedicated School's Grant 2024/25.
- 5.4 In 2022/23 and 2023/24 it was agreed that the projected balance of the growth fund was sufficient and both allocations were to be added into the school formula. It has been agreed by Schools' Forum that any unspent balance on the growth fund will be carried forward.
- 5.5 The table below shows the forecast balance on the growth fund.

Growth Fund 2022/23

	Diseconomies of Scale	Growth	Balance
Balance 31.03.22			-1,283,431
The Calcots		38,792	-1,244,639
Trinity		125,170	-1,119,469
<i>Highwood Underwriting</i>	155,000		-964,469
Est Balance 31.03.23			-964,469
<i>Highwood Underwriting</i>	155,000		-809,469
<i>Contingency</i>		192,500	-616,969
Est Balance 31.03.24			-616,969

6. Appendices

Appendix A- Growth Fund Applications 2022/23

Appendix B – Equalities Impact Assessment

Appendix A

Step 1 Calcot Infants and Nursery School

Step 2 Please tick the box that forms the basis of your application

a) Extra class in September to meet basic need

b) Increase in Admission number in September by 5 or more to meet basic need

c) Infant Class size - Additional class required as total number of R, yr 1 and yr 2 pupils has now exceeded a multiple of 30

Step 3

Year Group:	Pupil Numbers			No. of Classes			No. of Teachers FTE		
	Oct-22	Oct-21	Change	Oct-22	Oct-21	Change	Oct-22	Oct-21	Change
Reception	75	61	14	3	2	1	3	2	1
Year 1	70	67	3	3	3	0	3	3	0
Year 2	74	73	1	3	3	0	3	3	0
SUB TOTAL Infant C	219	201	18	9	8	1	9	8	1

Step 1 Trinity School

Step 2 Please tick the box that forms the basis of your application

a) Extra class in September to meet basic need

b) Increase in Admission number in September by 5 or more to meet basic need

Step 3

Year Group:	Pupil Numbers			No. of Classes			No. of Teachers FTE		
	Oct-22	Oct-21	Change	Oct-22	Oct-21	Change	Oct-22	Oct-21	Change
Year 7	274	215	59	10	8	2			0
Year 8	215	210	5	8	8	0			0
Year 9	210	206	4	8	7	1			0
Year 10	212	182	30	8	8	0			0
Year 11	175	183	-8	7	6	1	75	69	6
TOTAL All Classes	1086	996	90	41	37	4	75	69	6

Equality Impact Assessment (EqIA) - Stage One

We need to ensure that our strategies, policies, functions and services, current and proposed have given due regard to equality and diversity as set out in the Public Sector Equality Duty (section 149 of the Equality Act 2010), which states:

(1) A public authority must, in the exercise of its functions, have due regard to the need to:

(a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;

(b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; This includes the need to:

(i) remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;

(ii) take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;

(c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it, with due regard, in particular, to the need to be aware that compliance with the duties in this section may involve treating some persons more favourably than others.

(2) The steps involved in meeting the needs of disabled persons that are different from the needs of persons who are not disabled include, in particular, steps to take account of disabled persons' disabilities.

(3) Compliance with the duties in this section may involve treating some persons more favourably than others.

The following list of questions may help to establish whether the decision is relevant to equality (the relevance of a decision to equality depends not just on the number of those affected, but on the significance of the impact on them):

- Does the decision affect service users, employees or the wider community?
- Is it likely to affect people with particular protected characteristics differently?
- Is it a major policy or a major change to an existing policy, significantly affecting how functions are delivered?
- Will the decision have a significant impact on how other organisations operate in terms of equality?

- Does the decision relate to functions that engagement has identified as being important to people with particular protected characteristics?
- Does the decision relate to an area with known inequalities?
- Does the decision relate to any equality objectives that have been set by the Council?

Please complete the following questions to determine whether a full Stage Two, Equality Impact Assessment is required.

What is the proposed decision that you are asking the Schools' Forum to make:	Approve the growth funding to be issued to schools
Name of Service/Directorate:	Finance and Property/Resources
Name of assessor:	Melanie Ellis
Date of assessment:	17.01.23

Is this a ?		Is this policy, strategy, function or service ... ?	
Policy	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	New or proposed	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Strategy	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Already exists and is being reviewed	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Function	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Is changing	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Service	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>		

(1) What are the main aims, objectives and intended outcomes of the proposed decision and who is likely to benefit from it?	
Aims:	To approve the growth funding to be issued to schools
Objectives:	To approve the growth funding to be issued to schools
Outcomes:	To approve the growth funding to be issued to schools
Benefits:	To approve the growth funding to be issued to schools

(2) Which groups might be affected and how? Is it positively or negatively and what sources of information have been used to determine this?
<i>(Please demonstrate consideration of all strands – Age, Disability, Gender Reassignment, Marriage and Civil Partnership, Pregnancy and Maternity, Race, Religion or Belief, Sex and Sexual Orientation)</i>

Group Affected	Potential Positive Impacts	Potential Negative Impacts	Evidence
Age	None	None	
Disability	None	None	
Gender Reassignment	None	None	
Marriage and Civil Partnership	None	None	
Pregnancy and Maternity	None	None	
Race	None	None	
Religion or Belief	None	None	
Sex	None	None	
Sexual Orientation	None	None	
Further Comments:			

(3) Result	
Are there any aspects of the proposed decision, including how it is delivered or accessed, that could contribute to inequality?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	
Will the proposed decision have an adverse impact upon the lives of people, including employees and service users?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	

If your answers to question 2 have identified potential adverse impacts and you have answered 'yes' to either of the sections at question 3, or you are unsure about the impact, then you should carry out a EqIA 2.

If an EqlA 2 is required, before proceeding you should discuss the scope of the Assessment with service managers in your area. You will also need to refer to the EqlA guidance and template – <http://intranet/index.aspx?articleid=32255>.

(4) Identify next steps as appropriate:	
EqlA Stage 2 required	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Owner of EqlA Stage Two:	
Timescale for EqlA Stage Two:	

Name: Melanie Ellis

Date: 17.01.23

Please now forward this completed form to Pamela Voss, Equality and Diversity Officer (pamela.voss@westberks.gov.uk), for publication on the WBC website