

GROWTH FUND REVIEW

Report of the Director of Children's Services

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1. Purpose

- 1.1 To seek the agreement of the Forum to consult on the principles of the Growth Fund review.
- 1.2 To outline the timescales associated with the Growth Fund review.

2. Summary

- 2.1 This paper sets out the principles to be included in the summer consultation as part of the Growth Fund review as requested by the Forum.
- 2.2 It also explains the process and timescales in which the review will take place.

3. Recommendations

- 3.1 The Forum is asked to agree the principles to be included in the summer consultation; and the process and timescales associated with the Growth Fund review.

4. Growth Fund review

- 4.1 To assist with the review of the growth fund it is proposed that the following principles should be included within the summer consultation with schools:

- **Minimum class size that is financially viable**

The Growth Fund currently makes an assumption that 24 AWPUs (in 2015-16 equivalent to £65,543 for a full year outside the London fringe

area and £66,567 for a full year in the London fringe area) provides enough resource to fund an additional class.

Schools will be asked whether they agree, and to indicate whether they think that the figure should be higher or lower, and if so why.

- **Additional Educational Needs funding**

The Growth Fund currently provides additional resource for expanding schools based on AWPUP funding only. There is no uplift to reflect funding for additional educational needs (AEN), such as funding based on free school meal entitlements and prior attainment.

Schools will be asked whether AEN funding should also be taken into account when calculating Growth Fund allocations.

- **Leadership and Management**

Some schools have identified that there are considerable leadership and management costs involved in planning and delivering an expansion.

Schools will be asked whether the Growth Fund should recognise this by including an additional one off allocation for leadership and management.

- **Key stage 2**

In its funding for expanding primary schools, the Growth Fund makes no distinction between KS1 and KS2. However, the infant class size requirement does not apply to key stage 2 and it would therefore be possible to make different assumptions in respect of KS2 (for example that class sizes could be more than 30 or that mixed age classes should be expected where the pattern of pupil numbers suggested this).

Schools will be asked whether they think it would be reasonable to have different expectations for Key Stage 2, as compared to Reception/Key Stage 1.

- **Funding when a bulge class leaves**

Like other expanding schools, schools taking a one off bulge class receive a Growth Fund allocation to cover the period between the new class opening and the additional pupils being funded through the budget share. However, when the children in the bulge class leave the school some years later, no reduction is made to funding to reflect the lag between the pupil number reducing and this being reflected in the school's budget share.

Schools will be asked whether they think that a funding reduction should be made in this situation.

- 4.2 The Bishops Stortford new schools have prompted the need to review start-up costs for new schools/academies. Furthermore, it has been suggested that in the interests of fairness start-up funding should be considered for expanding schools as well.
- 4.3 Given that the work around start up-costs is very detailed and specific, it is proposed that this is not included within the summer consultation with schools. Rather, it is proposed that Growth Fund review sub-group consider this in more detail and report back to Schools Forum.

5. **Timescale**

It is proposed that the Growth Fund review timetable should be as follows:

Summer consultation	July & August
Growth Fund review group meeting to review start-up costs for new schools academies	July 2015
Growth Fund review group meeting to review consultation	September 2015
Report and recommendations to Schools Forum	7 October 2015

6. **Conclusion**

- 6.1 It is proposed that the principles set out above should be included in the summer consultation as part of the Growth Fund review.