

**REPORT TO:** School Forum

**DATE:** 16<sup>th</sup> October 2014

**REPORTING OFFICER:** Operational Director – Children’s Organisation and Provision

**SUBJECT:** **Capital Funding – Basic Need**

**1.0 PURPOSE OF REPORT**

1.1 This report provides an update on the allocation of Basic Need Capital and seeks approval for a bid process for Responsible Bodies based on Strategic Needs.

**2.0 RECOMMENDED: That**

2.1 **(a) School Forum approve the bid process outlined in the report for Responsible Bodies based on Strategic Needs.**

**3.0 BACKGROUND**

3.1 The Basic Need allocation supports the capital requirements for providing new pupil places by expanding existing maintained schools, free schools or academies and by establishing new schools. In Halton the pupil forecast data is used to determine if there is a need to provide additional school places in order to meet demand by comparing forecast data with school capacity data.

3.2 Since 2011/2012 Halton has used this funding to support Basic Need capital projects at Lunts Heath, Windmill Hill, St Bede’s Infant and Junior, Weston Primary. In addition, funding has been invested in the project to provide post-16 facilities for Ashley school.

3.3 The recent analysis of forecast and school capacity data shows that there is not an immediate pupil place Basic Need issue to address within Halton. From the funding available up to 2015 it was therefore agreed at the Executive Board of the Council on 4<sup>th</sup> September 2014 that funding of £1.4 million will be allocated towards meeting the building and organisational issues at the newly combined Fairfield primary school. £474,818 will be set aside to allow the other Responsible Bodies to submit applications to the authority to address their strategic building needs. The £936,409 2016/2017 allocation will be reserved to respond to pupil place planning/demographic issues arising in each primary or secondary sectors.

- 3.4 Applications will be invited from the Diocese, Individual Academy Trust and Multiple Academy Trusts. It will not be possible to consider applications from schools/academies that have been rebuilt within the last five years nor from schools/academies where plans have been approved to rebuild the school/academy within the next five years.
- 3.5 An application bid must be submitted for each project. The form is attached to this report as Appendix A. All bids will be capped at £50,000 per school/academy and the following criteria will be applied if the total amount of bids received exceeds £474,817. Applicants will be requested to detail the amount of investment in capital works since April 2011. The total capital investment per school will then be divided by the number of pupils on roll (excluding nursery and sixth form pupils and students) to calculate a per pupil investment figure. This will then provide a score. Please see the table below:

<b>Investment per pupil</b>	<b>Score</b>
< £500	8
£501 - £750	7
£751 - £1,000	6
£1,001 - £1,250	5
£1,251 - £1,500	4
£1,501 – £1,750	3
£1,751 - £2,000	2
>£2,000	1

This score will then be added to the percentage of free school meal figure per school, based on the May 2014 census, to create an overall score. Funding will then be prioritised based on the highest scores.

- 3.6 Once a bid has been approved by the LA each responsible body will then cash flow the project and claim re-imbursement on production of invoices on completion of the work.