**Schools Forum**

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| **Report title:** | **Amalgamation Protection - Disapplication** |
| **Date** | **27 January 2023** |

**Executive summary**

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| The Local Authority has made a disapplication request for a second financial year of amalgamation protection (2023/24), for the value of 70% of two lump sums, on behalf of Holy Cross Church of England Primary School and Ormiston Cliff Park Primary Academy which has been agreed by the DfE.  **For information only.**  **Schools Forum members were asked over email to agree the application of a second (and final) year of amalgamation protection for Holy Cross Church of England Primary School and Ormiston Cliff Park Primary Academy, at 70% of two lump sums, for the 2023/24 financial year.**  **Schools Forum members agreed to continue to support amalgamation protection, and the DfE has now approved the disapplication request.** |

1. **Amalgamation Protection**

The ‘Schools Revenue Funding 2023 to 2024 Operational Guide’ published by the DfE for the funding of mainstream schools in the 2023/24 financial year states that where schools have amalgamated during the financial year 2022/23, or will amalgamate on 1 April 2022, they will retain the equivalent of 85% of the predecessor schools’ lump sums for the financial year 2022/23, calculated as follows:

2 x lump sum of £121,300 x 85% = £206,210, minus the lump sum allocated of £121,300 = £84,910.

1. **Second Year of Protection**

Local authorities may apply to the DfE for a second year of protection for schools that amalgamated during the 2022/23 financial year (having already received the first year of protection on the basis of 85% as shown above).

Applications must specify the level of protection sought, although in general the DfE would not expect the additional protection to exceed 70% of the combined lump sums. The DfE considers applications on a case-by-case basis.

In the past, all schools that have amalgamated in Norfolk have received the 70% of two lump sums for the second year of amalgamation protection, applied for by the local authority on the schools’ behalf. In purely financial terms, amalgamation reduces the overall cost to the formula by the cost of one school’s lump sum, and therefore increases funding across the system and to date this has been supported through the local formula.

1. **Application for Protection 2023/24**

Wormegay Church of England Primary School and Runcton Holme Church of England Primary School amalgamated 1st September 2021, to become one larger school and qualified for the first year of amalgamation protection in 2022/23.

Ormiston Cliff Park Infant Academy and Ormiston Cliff Park Junior Academy amalgamated 1st September 2021, to become one larger school and qualified for the first year of amalgamation protection in 2022/23.

The ESFA required confirmation from Schools Forum of their continued support for the disapplication request for a second year of amalgamation protection for both schools, and this was agreed with members approving over email.

A second year of amalgamation protection for each school, at 70% of two lump sums, is calculated as follows:

£121,300 x 2 x 70% = £169,820, minus one original lump sum value of £121,300 = **£48,520 protection.**

**Action required:**

**For information only.**

**Schools Forum members were asked over email to agree the application of a second (and final) year of amalgamation protection for Holy Cross Church of England Primary School and Ormiston Cliff Park Primary Academy, at 70% of two lump sums, for the 2023/24 financial year.**

**Schools Forum members agreed to continue to support amalgamation protection, and the DfE has now approved the disapplication request.**

###### Officer Contact

If you have any questions about matters contained in this paper, please get in touch with:

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