

# AGENDA

**Meeting:** Schools Forum  
**Place:** Council Chamber - County Hall, Bythesea Road, Trowbridge, BA14 8JN  
**Date:** Thursday 19 January 2023  
**Time:** 1.30 pm

Please direct any enquiries on this Agenda to Lisa Pullin, Tel 01225 713015 or email [committee@wiltshire.gov.uk](mailto:committee@wiltshire.gov.uk) of Democratic Services, County Hall, Bythesea Road, Trowbridge, BA14 8JN.

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<b>Membership:</b>	<b>Representing:</b>
Aileen Bates	WGA - Special School Governor Representative
Lyssy Bolton	Early Years Representative
Angela Brennan	Observer - Children and Families Voluntary Sector Forum
Andy Bridewell	PHF - Maintained Primary Representative
Rebecca Carson	PHF - Primary Academy Representative
Michele Chilcott	WASSH - Secondary Academy Representative
Stella Fowler	WGA - Primary School Governor Representative
Jo Grenfell	Observer - Post 16, Wiltshire College
Jon Hamp	Special School Academy Representative
John Hawkins	Teaching Association Representative
Cllr Ross Henning	Observer - Local Youth Network
Georgina Keily-Theobald	WASSH - Maintained Special School Representative
Graham Nagel-Smith	PHF - Primary Academy Representative
Nick Norgrove	WASSH - Maintained Secondary School Representative
Emma Osmund	Early Years Representative
Lisa Percy	Secondary Academy Representative
Giles Pugh	Salisbury Diocesan Board of Education Representative
John Read	PHF - Maintained Primary Representative
Graham Shore	PHF - Primary Academy Representative
Trudy Srawley	Observer - Wiltshire Parent Carer Council
Ros Sutton	WGA - Primary School Governor Representative
Ian Tucker	Chair of WASSH - Secondary Academy Representative
David Whewell	WGA - Secondary School Governor Representative
Catrina Williamson	PHF - Maintained Primary Representative

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## PART I

Items to be considered whilst the meeting is open to the public

### 1 **Apologies, Substitutions and Changes of Membership**

To note any apologies, substitutions and changes to the membership of Schools Forum.

### 2 **Minutes of the Previous Meeting** (*Pages 7 - 16*)

To approve as a correct record and sign the minutes of the meeting held on 8 December 2022 (copy attached).

### 3 **Chair's Announcements**

To receive any announcements from the Chair.

### 4 **Declaration of Interests**

To note any declarations of interests.

### 5 **Public Participation**

Schools Forum welcomes contributions from members of the public who are able to ask questions or make a statement in relation to the responsibilities and functions of the Forum at each meeting. A maximum of 15 minutes will be allocated to this at the start of each meeting, and each question or statement should last no longer than 3 minutes. Please register with the Officer named on this agenda, and in accordance with the deadlines below.

#### Statements

Members of the public who wish to submit a statement in relation to an item on this agenda should submit this electronically to the Officer named on the agenda **no later than 5pm on Tuesday 17 January 2023**. Statements must not be defamatory, frivolous, offensive, vexatious, unlawful or otherwise improper. They must not name or identify individual service users, members of staff or members of partner agencies.

#### Questions

Those wishing to ask questions are required to give notice of any such questions to the Officer named on the front of this agenda **no later than 5pm on Thursday 12 January 2023** to allow a response to be formulated. Questions are limited to a maximum of 2 per person/organisation. A response will be given as either a direct oral answer or a written reply. Questions must not require the disclosure of confidential information. The Chair's ruling on rejection of a question is final.

6 **Updates from Working Groups** (*Pages 17 - 20*)

The Forum will be asked to note the minutes/updates from the following meetings:

- Early Years Reference Group – 6 January 2023 – *to follow*.
- Joint meeting of the School Funding Working Group and SEN Working Group – 9 January 2023 – *attached*.

7 **Dedicated Schools Budget - Budget Monitoring 2022-23** (*Pages 21 - 26*)

The report of Marie Taylor (Head of Finance – Children and Education) seeks to present budget monitoring information against the Dedicated Schools grant (DSG) for the financial year 2022-23 as at 30 November 2022.

8 **High Needs Block Update**

Cate Mullen (Head of SEND and Inclusion) will give a verbal update on behalf of the High Needs Block working group.

9 **Additional School Capital Funding for 2022-23 - Funding and Methodology** (*Pages 27 - 30*)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to update Schools Forum and outline the level of additional capital funding and how it will be allocated to schools in the 2022-23 year.

10 **School Budget Setting 2023-24**

To consider the budget for 2023-24.

The following update reports provide details on the overall funding settlement on each of the funding blocks, the decisions will be made after consideration of all the update papers via the decision matrix.

10a **School Revenue Funding 2023-24 - Funding Settlement and Budget Setting Process** (*Pages 31 - 38*)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to update Schools Forum on the revenue funding settlement and the budget setting process for 2023-24.

10b **Dedicated Schools Grant - Early Years Block Update 2023-24 (Indicative Allocations)** (*Pages 39 - 48*)

The report of Marie Taylor (Head of Finance – Children and Education) seeks to update Schools Forum on issues relating to the early years block for 2023-24 and the decisions that will need to be made as part of the budget setting process for 2023-24.

10c **Dedicated Schools Budget - Central School Services Block Update 2023-24** (*Pages 49 - 60*)

The report of Marie Taylor (Head of Finance – Children and Education) seeks to update

Schools Forum on issues relating to the Central Schools Services Block (CSSB) budget for the 2023-24 financial year and the decisions that will need to be made as part of the budget setting process.

10d      **Dedicated Schools Budget - Schools Block Update 2022-23  
(Delegated Budget)** (Pages 61 - 66)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to update Schools Forum on issues relating to the schools delegated budget for 2023-24 and the decisions that need to be made as part of the budget setting process.

10e      **Mainstream Schools Additional Grant (MASG) 2023-24 - Funding  
and Methodology** (Pages 67 - 68)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to update Schools Forum and outline the level of additional funding and how it will be allocated to schools in the 2023-24 year.

10f      **Dedicated Schools Budget - High Needs Block Update 2023-24**  
(Pages 69 - 76)

The report of Marie Taylor (Head of Finance – Children and Education) seeks to update Schools Forum on issues relating to the high needs block for 2023-24 and the decisions that will need to be made as part of the budget setting process for 2023-24. *Please note that appendices 2 and 4 are to follow.*

11      **School Budget Decisions 2023-24**

Schools Forum will be asked to consider the School Budgets for 2023-24 and make relevant decisions using the decisions matrix.

12      **Confirmation of Dates for Future Meetings**

To confirm the dates of future meetings, as follows all to start at 1.30pm:

- 16 March 2023 (if required) (Planned to be via Microsoft Teams)
- 8 June 2023 (Planned to be via Microsoft Teams)
- 5 October 2023 (Planned to be via Microsoft Teams)
- 7 December 2023 (Planned to be face to face).

13      **Urgent Items**

To consider any other items of business, which the Chair agrees to consider as a matter of urgency.

**PART II**

Item(s) during consideration of which it is recommended that the public should be excluded because of the likelihood that exempt information would be disclosed

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## Schools Forum

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### **MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 8 DECEMBER 2022 AT COUNCIL CHAMBER - COUNTY HALL, BYTHESEA ROAD, TROWBRIDGE, BA14 8JN.**

#### **Present:**

Aileen Bates, Angela Brennan, Andy Bridewell, Stella Fowler, John Hawkins, Graham Nagel-Smith, Nick Norgrove, Lisa Percy, Giles Pugh, John Read, Graham Shore, Ros Sutton, Ian Tucker, and Catriona Williamson

#### **Also Present:**

Grant Davis (Schools Strategic Financial Support Manager), Cllr Dominic Muns (Portfolio Holder for Education), Lisa Pullin (Democratic Services Officer), Marie Taylor (Head of Finance – Children and Education), and Cllr Suzanne Wickham (Portfolio Holder for SEND)

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#### **18 Apologies/Substitutions and Changes of Membership**

Apologies were received from Nikki Barnett, Lyssy Bolton, Rebecca Carson, Michele Chilcott, Cllr Ross Henning, Georgina Keily-Theobald, Emma Osmund, Trudy Srawley and David Whewell and from Andrew Best (Head of School Effectiveness), Cllr Jane Davies (Cabinet Member for Adult Social Care, SEND, Transition and Inclusion), Helean Hughes (Director – Education & Skills), Cate Mullen (Head of SEND & Inclusion) and Lucy Townsend (Director of Children's Services).

#### **Substitutions**

There were no substitutions.

#### **19 Minutes of the Previous Meeting**

The minutes of the meeting held on 6 October 2022 were presented.

#### **Resolved:**

**That the Chair approve and sign the minutes of the meeting of Schools Forum held on 6 October 2022.**

#### **20 Chair's Announcements**

The Chair made the following announcements:

#### **Welcome**

To Nick Norgrove from Abbeyfield School in Chippenham who has now been confirmed as the new maintained secondary school representative.

21 **Declaration of Interests**

There were no interests declared.

22 **Public Participation**

No questions or statements were received in advance of the meeting.

23 **Updates from Working Groups**

The Forum noted the update received by way of the minutes of the joint meeting of the School Funding and SEN Working Group held on 21 November 2022. There were no questions arising.

The Forum noted the update received by way of the minutes of the meeting of the Early Years Reference Group meeting held on 23 November 2022. There were no questions arising.

**Resolved:**

**That Schools Forum note the minutes of the joint meeting of the School Funding and SEN working group held on 21 November 2022 and the meeting of the Early Years Reference Group held on 23 November 2022.**

24 **Dedicated Schools Budget - Budget Monitoring 2022-23**

Marie Taylor (Head of Finance – Children and Education) referred to the report which presented the year end budget monitoring information against the DSG for the financial year 2022-23 as at 31 October 2022 and highlighted the following:

- The overspend forecast of £9.260m was currently projected against the overall schools budget which was an increase of £2.223m which was largely due to the finalised September specialist school placements for the new academic year and a result of teams making gains on the inevitable delay due to children not being in school and able to be assessed during the pandemic and the social and educational wellbeing impact of lockdown on children had meant that the number of EHCP plans had exceeded pre-pandemic rates;
- For the early years budgets there was a forecast underspend of £2.386m although it was anticipated that that the DfE's post financial year adjustment would adjust for this in whole or in part in the 2023-24 financial year if the January 2023 census numbers fall. The Inclusion Support Funding for those with additional needs was forecast to be overspent for first time as the offer had been extended for 30 hours in settings so that working parents could take advantage of it;



- Officers had been successful with a 2022-23 bid for COMF grant funding to use in early years settings to allow them to remain open. The Hardship fund had not had much take up in previous years but was available if needed;
- The forecast underspend on the schools budget of £0.141m largely related to the school supply cover fund which was helping to offset the overall pressure on the DSG;
- The high needs budgets continued to be of concern with a projected overspend of £11.820m. The biggest areas of overspend are Independent Special School packages, alternative provision, named pupil allowances and top ups;
- There was a projected 16.1% increase in the number of EHCP's and it was hoped that this would soon reach a plateau and then start to drop again over time;
- There was a small forecast understand of £0.034m of the central school services block budget which had been driver by careful management of the specialist education packages for children in care;
- The DSG reserve brought forward of £25.973m is increased by the positive early years block adjustment. The forecast overspend would take the reserve into a deficit position of £32.446m. The LA was working closely with the DfE Developing Better Value partners CIPFA and Newton to enhance the current plans and this also added insight from other LA action plans and offered the opportunity to bid for transformational funding; and
- 75% of LA's have a deficit DSG and those worst affected are part of the Safety Valve programme and those on the next level down are part of the Developing Better Value programme which Wiltshire are part of.

**Resolved:**

**That Schools Forum note the year end budget monitoring position as at 31 October 2022 in conjunction with the high needs recovery plan and the Developing Better Value update.**

25 **SEND Update**

Marie Taylor (Head of Finance – Children and Education) gave an update on SEND on behalf of Cate Mullen (Head of SEND & Inclusion) who was not able to be present at the meeting and highlighted the following;

- The current developments in SEND were:
  - i) SAIL (new Special School in the South of the County) to open in September 2023 to provide additional ASC/SEMH specialist places

- ii) The Silverwood School new build would open for September 2023 – the cabinet meeting on 13 December 2022 would be discussing proposals for the sites in Chippenham and Trowbridge – [click here for the link of children speaking to Newsround about the Silverwood school](#)
  - iii) Additional resource bases opened in September 2022 (Clarendon and Kiwi) with another due to open in January 2023 (Lyneham)
  - iv) Work underway to commence phase 1 of Secondary Resource Base provision in September 2023 with further phases planned
  - v) Participation in the Delivering Better Value (DBV) programme – the LA were hoping to be in the third tranche of the DBV programme to gain funding to progress work
  - vi) Ongoing recruitment activity in statutory SEND and EP services
  - vii) Recognition of challenge around primary SEMH provision
- The DfE had confirmed verbally that the Supplementary Grant would be receivable for 2023-24 and to assume the same sort of allocation (£2.3m) for planning purposes. Part of this funding would be used to fund the minimum funding guarantee for Special schools to bolster inclusion and ensure that there are sufficient levels of leadership;
  - The areas being considered moving forward (which have been extracted from the safety value learning) were:
    - i) Early intervention focus
    - ii) Increased SEN support offer
    - iii) Review of EHCP assessment processes and thresholds
    - iv) Culture change and work with school leaders
    - v) Appropriate and through provision mapping with potential development of more local provision.

**Resolved:**

**That Schools Forum note the SEND update.**

26 **Dedicated Schools Grant Consultations 2023-24**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on the results of the recent autumn consultations relating to de-delegation of central services and the transfer of funds from Schools Block to the High Needs Block and highlighted the following:

***De-Delegation***

- The consultation took place in the autumn term and 21 responses were received – 18 from primary schools and 3 from secondary schools. This compared slightly less favourably than the contact for the previous year, however it is widely known that that schools rely on their Schools Forum colleagues to make appropriate decisions on their behalf. The results received were significantly in favour of retaining the de-delegated services in both the primary and secondary schools;

### ***Transfer between Blocks***

- For a number of years Schools have been consulted regarding a potential transfer of funds between the Schools block and the High Needs block to help with the increasing demand and costs of SEN within the county and whilst this was a generally unwelcome question to ask schools this has been supported and the transfers made of 0.5% from the 2020-21 financial year;
- There was a good response from schools (21) to the consultation which was from 14 primary and 7 secondary schools. They all agreed that there should be a transfer of some funds to the High Needs block and only one school was in favour of a reduction in Top-Up values. 17 of the respondents supported a transfer of up to £1.71m (0.5%) to the High Needs block;
- Schools Forum members were being asked to consider the consultation results and make in principle decisions relating to the de-delegation of central services and for the support of a transfer to the High Needs block.

### **Resolved: That Schools Forum**

- 1. Note the local consultation responses in relation to the schools delegated budget for the 2023-24 financial year.**
- 2. Agree that the following “in principle” decisions be made relating to de-delegation of central services for primary and secondary Maintained schools**
  - i. FSM – primary and secondary**
  - ii. Licences – primary and secondary**
  - iii. Trade Union – primary and secondary**
  - iv. Maternity – primary and secondary**
  - v. Ethnic Minority Support – primary only**
  - vi. Traveller Education – primary only**
  - vii. Behaviour Support – primary only**
- 3. Agree to a block transfer between Schools Block and the High Needs Block, subject to affordability when school funding for 2023-24 has been confirmed of 0.5% (the maximum allowable without Secretary of State approval) which equates to approximately £1.71m.**

### **27 Local Consultation - School Improvement Services 2023-24**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on the results of the recent consultation with maintained schools relating to the removal of the Local Authority Monitoring and Brokering (LAMB) Grant for 2023-24 and highlighted the following:

- The LAMB had been provided to LA's since 2017, to help fulfil their core improvement activities, which was based on the number of maintained schools. The proposals from the DfE were to reduce the grant by 50% in 2022-23 with full removal in the 2023-24 year. For the 2022-23 year, maintained schools members of Schools Forum agreed to fund the loss of 50% of the LAMB grant through de-delegation and would consult colleagues once again before any decision would be taken for the 2023-24 year;
- The consultation was open to all maintained schools and 39 responses were received from 4 secondary, 34 primary and 1 special school. The overall results showed that the majority supported funding of the LAMB grant at 100% as their first choice. This was also the preference for primary schools; and
- Out of the 5 responses from secondary and special schools the preference was to fund the LAMB grant at 50%, but Officers were aware that subsequent to the consultation that schools had been in discussions with Andrew Best (Head of School Improvement) and that there had been a slight change in the thinking of how the LAMB grant should be funded.

A primary school governor representative commented that the figures demonstrated that collectively, there was more support funding a 75% - 87.5% loss of LAMB funding. Grant Davis responded that Officers had to draw conclusions from the consultation but that it was not an exact science and yes there was a mixed bag of responses. Grant was aware that the Primary Heads Forum had also met with Andrew Best to discuss the School Improvement offer going forward. With the consultation findings and the value added discussions that had happened since between Andrew Best and schools, Andrew had indicated that he would have a year to demonstrate the value of the School Improvement service and if it did not perform as expected for schools then of course he would assume that schools would not agree to funding of it in future years.

A maintained primary representative confirmed that she had been worried about committing to the funding of the LAMB grant but recognised the support given by the School Improvement service to the schools who may be looking to become an academy. However, given the current financial issues for schools with pay increases etc she was hearing now from colleagues that perhaps the schools would prefer for 87.5% of funding of the LAMB grant.

A maintained secondary school representative reported that he had met with Andrew Best who acknowledged that he had 12 months to show value for money. The representative felt that if they didn't support the grant at this level the impact would be significant and on behalf of maintained schools, he was in support of the funding of 100% of the LAMB grant.

The primary school governor representative reported that she had concerns around the clarity of the role of the School Improvement Officer but from listening to comments was now slightly reassured. Grant Davis reported that Andrew Best had worked hard to share with schools his intentions for the service and how he planned to deliver the model of support. If the funding for the LAMB grant was not approved schools could pool their money together to purchase an external school improvement service as part of a cluster arrangement. However the emphasis was clearly for Andrew Best to deliver a service that schools were happy with otherwise they would vote with their feet in future years.

**Resolved: That Schools Forum**

- 1. Note the local consultation responses in relation to the school improvement services for the 2023-24 financial year.**
- 2. Agree to make the “in principle” decision of funding the LAMB grant at 100% for the 2023-24 year, for both Primary and Secondary schools.**

28 **Allocation of Funding for Pupil Growth 2023-24**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought agreement on the methodology for allocating funding for pupil growth from the schools block Growth Fund 2023-24 and highlighted the following;

- The DfE consultation during the Summer of 2022, proposed options around the future for Growth funding and whilst no decision had been taken, it was recognised that awarding growth funding at a local level would be appropriate, with LA’s being able to apply local knowledge and intelligence;
- In Wiltshire, growth is measured by separating the county into 62 Middle Layer Super Output Areas (MSOA’s) with an average of 4 schools in each MSOA area. The growth factor allocates £1,520 for each primary ‘growth’ pupil, £2,275 for each secondary ‘growth’ pupil and £74,700 for each brand new school that opened in the previous year;
- The Wiltshire allocation for 2023-24 would be announced on or around 16 December 2022 as part of the schools funding announcement and would be allocated using the formulaic approach, based upon lagged growth data. The proposed criteria was unchanged from the 2013-14 year for new school allowance and class expansion for basic need and was also used for infant class size increases;
- LA’s can also set aside Schools block funding to create a small fund to support good schools with falling rolls, where local planning data shows that surplus places will be needed within the next three financial years. Any fund established for a Falling Rolls fund would represent a top slice of the Schools block and Schools Forum had previously resisted the

establishing of such a fund with less than 50% of LA's having a Falling Rolls fund; and

- The DfE consultation in the summer of 2022 did propose amendments to the rules surrounding a Falling Rolls fund, however the results of that consultation have not yet been published.

**Resolved: That Schools Forum**

- 1. Approve the criteria for allocating pupil growth fund in 2023-24.**
- 2. Agree that the budget for the growth fund will be set at its meeting in January 2023 when the full DSG has been confirmed for the 2023-24 year.**
- 3. Will consider establishing of a Falling Rolls Fund and any criteria befitting such a fund once the outcome of the DfE's 2022 consultation has been received.**

**29 National Funding Formulae for Schools and High Needs - 2023-24**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought 'in principle' decisions with regards to the Wiltshire Funding Formula for the 2023-24 year and highlighted the following;

- The early heads up from the DfE of indicative DSG Block allocations based on the October 2021 census was really helpful and Schools Forum members would recall that this was able to be discussed at the last meeting on 6 October 2022;
- The Government has pledged to boost schools funding with an increase of £2.3bn into the overall Schools Block compared to the 2022-23 year. The DfE allocate school funding on the basis of the National Funding Formula (NFF) and have confirmed that 2023-24 will be another 'soft' year with local Schools Forums still retaining its role in determining the school funding allocation methodology;
- The DfE are proposing to move to the full hard formula by 2027-28 and in the meantime, there would be a tightening on those not aligned to the NFF. Wiltshire have mirrored the NFF for a few years now;
- The main formula for the 2023-24 year was broadly similar to the 2022-23 year with some changes as detailed below:
  - i. Overall, funding through the NFF will increase by 1.9%
  - ii. Core pupil-led funding factors and the lump sum to increase by 2.4%
  - iii. Disadvantaged funding, FSM6 and IDACI factors to increase by 4.3%
  - iv. The 'Minimum per pupil funding level' to increase by 3.3% to;
    - a. £4,405 for Primary
    - b. £5,715 for Secondary

- v. The School Supplementary Grant from 2022-23 has been rolled into the baseline funding and then inflated by the relevant percentage increases.
  - vi. The Free School Meals factor (for the costs of providing a meal for eligible pupils) to increase by 2%
  - vii. Every school to receive at least 0.5% more funding per pupil
  - viii. A transfer of up to 0.5% of Schools Block funding to the High Needs Block will be permitted, subject to Schools Forum approval
  - ix. All NFF factors must be used in the formula and
  - x. The funding for EAL must be the EAL3 factor, meaning pupils will attract funding for the first three years they are within the state school system.
- All NFF factors will be mandatory from 2023-24 and when the final allocations are confirmed in December 2022, they will then go to the Full Council meeting in February 2023 for final ratification.

**Resolved: That Schools Forum make “in principle” decisions for the following formula factors to enable school budgets to be prepared ready for the January 2023 meeting.**

- a. To apply all the NFF factors in full
- b. To set the Minimum Funding Guarantee at +0.5% (in line with the NFF).

### 30 **Confirmation of Dates for Future Meetings**

The Forum noted that the future meetings would be held on:

19 January 2023 (planned to be face to face at County Hall, Trowbridge)  
 16 March 2023 (if required) (Via Microsoft Teams)  
 8 June 2023 (Via Microsoft Teams)  
 5 October 2023 (Via Microsoft Teams)  
 5 December 2023 (Via Microsoft Teams)

### 31 **Urgent Items**

The Chair gave permission for the following very recent good news update to be shared with Schools Forum members. Grant Davis (Schools Strategic Financial Support Manager) highlighted the following:

#### *Autumn Statement Updates*

There had been some good news for the education sector last month as part of the autumn statement with the announcement of £2.3bn in extra funding for 2023-24. Initially it was thought that this was ‘recycled’ funding but it is additional monies. However, the £300m for the National Insurance increase was being withdrawn as that decision has been reversed so there would be £2bn being split between the High Needs and Schools blocks.

The indicative figures from the DFE show that it would be roughly similar to this year’s School Supplementary grant. It was likely to be called something else to

avoid confusion. Schools would receive a per pupil rate, an element for FSM6 and a lump sum increase.

*Additional Devolved Formula Capital Grant for Schools for the 2022-23 financial year*

The DfE have announced that schools and sixth-form colleges will receive an allocation from an additional £447 million of capital funding to improve energy efficiency in the 2022-23 financial year. The funding is for all schools and payments will be made in late December/early January 2023. The school should spend this funding on capital projects with priority being given to improve the school estate's energy efficiency, although this funding would not be funding ring fenced for energy efficiencies.

The DfE anticipate schools will use the funding in the 2022-23 financial year, however any unspent monies could be carried forward into the next financial year. The allocations were based upon all schools receiving a flat rate of £10,000, plus an amount of £20.06 per weighted pupil. For Wiltshire this was anticipated to be an extra £4.2m of capital and the average school would receive £17,894. Schools would be able to choose how this was spent as there were no known reporting requirements to the DfE.

A maintained primary school representative asked if there any news on the whether the PE grant would continue. Grant Davis reported that there was nothing definitive of this but that he hoped that this would continue and there was a need for physical education and health awareness for children and young people.

**Resolved:**

**That Schools Forum note the updates.**

(Duration of meeting: 1.30 - 3.05 pm)

The Officer who has produced these minutes is Lisa Pullin, of Democratic Services, direct line 01225 713015 , e-mail [committee@wiltshire.gov.uk](mailto:committee@wiltshire.gov.uk)

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## Schools Forum

### School Funding and SEN Working Group

#### MS TEAMS MEETING

**09<sup>th</sup> January 2023**

#### Minutes

**Present:** Marie Taylor (Chair), (Finance, local authority ((LA)), Grant Davis (Finance, LA), Cate Mullen (Head of Inclusion & SEND, LA), Lisa Percy (Chair of SF / Hardenhuish), John Hawkins (Teacher / Governor rep), Catriona Williamson (Mere) Graham Nagel-Smith (Morgan’s Vale & Woodfalls), Graham Shore (Deputy Chair SF / Holy Trinity), Rebecca Carson (Woodford Valley)

**Apologies:** Helean Hughes (Director LA), Andy Bridewell (Ludgershall Castle), Simon Thomas (LA), Gary Binstead (LA), Georgina Kiely-Theobald (Downland) John Read (Lyneham)

1.	<p><b>Welcome and Apologies</b></p> <p>MT welcomed the group to the virtual meeting.</p>	
2.	<p><b>Minutes</b></p> <p>There were no outstanding actions.</p>	
3.	<p><b>Matters Arising</b></p> <p>There were no matters arising.</p>	
4.	<p><b>High Needs Update – (CM)</b></p> <p>CM provided a verbal update highlighting firstly, bad news; the deficit of £34m hasn’t gone away but better news; which was progress across</p> <ul style="list-style-type: none"> <li>a. the local authority’s enrolment in the DfE’s “Delivering Better Value” programme of support and funding to assist with recovery plans. Starting with a 6 month diagnostic starting in July 2023 followed by an 18 month implementation – collaborative, supportive approach with oversight from Schools Forum continuing.</li> <li>b. Successful bid to the local authority transformation reserve of £1.6m across three years to facilitate capacity</li> <li>c. Council MTFs – investment in statutory SEN to keep a pace with demand</li> <li>d. DSG Deficit statutory accounting override extended in the Autumn Statement to 31<sup>st</sup> March 2026 which means the DSG deficit reserve remains ringfenced and does not impact the Councils balance sheet performance.</li> <li>e. Additional HNB £2.9m – funding SS MGF and early help</li> </ul> <p>LP reminded the group that good news should include the schools continued commitment to transfer of 0.5% to support the HNB – CM wholeheartedly agreed.</p> <p>CM left the meeting to attend another at 9am.</p>	
5.	<p><b>Schools Funding (DSG) Budget Monitoring (MT)</b></p> <p>MT shared her report &amp; appendices – highlights, underspends in EY will be subject to a post financial year adjustment in June/July 2023 by the DfE. Schools block small underspend offsets the HNB pressures. HNB pressures in line with demand for services and previous years demand patterns – no significant changes since the last report was shared in December.</p> <p>Intention to use some of the EY ringfenced reserve to fund some inclusion in turn contributing to school readiness and inclusion agendas.</p>	
6.	<p><b>Schools Budget 23-24 (GD)</b></p> <p>GD took the group through his report which included;</p>	

	<p>Schools - the last year of Boris billions, plus the Autumn statement announcements and MSAG mainstream schools additional grant which replaced the supplementary grant now baselined into 2023-24 DSG.</p> <p>Increases of 2.4% on core factors, 4.3% deprivation &amp; 1.9% overall in DSG funding. 23-24 still a soft year so some local flexibility is available. Wiltshire has aligned to the NFF prior to it being mandatory, which provides greater stability for all schools. Significant increases since 2019-20 as shown on the table, primary pupils down but not as much as the birth rate data indicated. Secondary pupils increased gradually from 2018-19.</p> <p>Overall, we are educating and funding an increased number of pupils across Wiltshire year on year.</p> <p>CSSB historic element 20% reduction HNB Oct 22 census + additional grant EY – provisional allocation &amp; uplifted funding rates</p>	
7.	<p><b>Early Years Budget 23-24 (MT)</b></p> <p>MT shared her report and appendices. Wiltshire's proposal is to Passport the increase in rates received from the DfE in full Fund pay inflation for 22/23 &amp; 23/24 Increase deprivation &amp; rurality to reflect demand EYRG had supported the proposal when consulted on 6/1/23 The group had no queries or comments and noted the report.</p>	
8.	<p><b>Central School Services Budget 23-24 (MT)</b></p> <p>MT shared her report and appendices. The DfE have shared the licences figure and so this is the final budget estimate. Inflation has been added to the former ESG services, historic factors cannot increase, and the 20% reduction is in CERA to protect services The group had no queries or comments and noted the report.</p>	
9.	<p><b>Schools Block (GD)</b></p> <p>GD took the group through his report</p> <p>Wiltshire can afford to fully fund the NFF (unlike some neighbouring LA's) despite increases in numbers of FSM and EAL pupils. Calculations around the growth fund confirm that it is affordable at £0.5m. MFG at 0.5% has a low-cost pressure of £165k as Wiltshire is so aligned to the NFF. Sparsity – maximum values of £81.9k in Secondary and £56.3k in Primary (with tapering) offers protection to rural schools but represents only 0.72% of total SB. MPPFL - £2.497m for 23-24 – reduces year on year as more schools are funded at NFF levels. 72 schools in 22-23 reducing to 36 schools in 23-24. The 0.5% transfer to support the HNB is affordable.</p> <p>GD asked the group for comments LP commented good strategic financial planning has got Wiltshire to this position.</p>	
10.	<p><b>High Needs Block Budget 2023-24 (MT)</b></p> <p>MT shared her report and appendices which, included the proposed approach for the additional high needs funding of £2.9m. The group noted the gap in funding estimated commitments for 23-24 and the consensus of the group was that investing the £2.9m in capacity and early help was an approach which aligned with the SEN strategy and long term would contribute to the recovery plan in a more impactful way than simply increasing the demand led budgets.</p> <p>GS – speech and language support is vital as children coming into school are struggling. For example, speaking in full and proper sentences. MT took an action to report back to Emma Cooke and query whether there will be a focus in this area with the planned investment</p>	MT

	<p>JH – great difficulty recruiting a replacement SENCO and the previous incumbent did report back she felt isolated, so network, training &amp; support would be welcomed. Additionally, the census data for EAL students in his school was surprisingly high queried whether others were similar?</p>	
11.	<p><b>Mainstream Schools Additional Grant (GD)</b></p> <p>GD took the group through his report. This is the grant which replaces the 2022-23 supplementary grant which is now added to and included in the 23-24 base budget.</p> <p>The MSAG is only payable to primaries and secondaries (not Early years or post-16) and comprises a lump sum and PP value for each pupil and an amount for each FSM6 pupil. All schools will receive the funding for the 2023-24 financial year and Academies will receive funding to cover April 2024 to Aug 2024 to ensure equity and parity and mainstream schools will have values built into their base funding for the 2024-25 year.</p>	
12.	<p><b>Capital 2022-23 Grant (new) (GD)</b></p> <p>GD took the group through his report. This late to be announced grant is aimed at energy efficiency schemes but is not ringfenced and can be carried forward to 23-24. Payments are £10,000 per school plus a per pupil rate of £20.06 with a weighted pupil allocation. In additional VA schools have an 8% uplift to compensate for unreclaimable VAT and the 90% limit for SOS contributions.</p> <p>The group had no queries or comments and noted the report.</p>	
9.	<p><b>AOB</b></p> <p>There was no AOB however following the meeting, CW updated MT that AB would no longer attend the working group but we are not losing him from Schools Forum, CW will ensure AB is updated and of course, papers will still be shared.</p>	
10	<p><b><i>Date and Time of next Meeting</i></b></p> <p>The March meeting of Schools Forum is unlikely to proceed – unless the DfE issue any consultations or significant changes/updates are required however, the provisional dates are:</p> <p>March SFWG 8.30 27<sup>th</sup> February 2023, Schools Forum 1.30pm 16<sup>th</sup> March 2023</p> <p>The next confirmed Schools Forum meeting after our January meeting will be <b>Thursday 8<sup>th</sup> June 2023 @ 1.30pm</b>. This is planned as a virtual meeting.</p> <p>The date of the next meeting of this group is scheduled for <b>Monday 22nd May at 8.30am</b>. This is planned as a virtual teams meeting. Please note half term for Wiltshire schools falls between these two meetings.</p>	

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**Schools Forum Funding & SEN Working Group  
9 January 2023**

**Schools Forum  
19 January 2023**

**DEDICATED SCHOOLS BUDGET – BUDGET MONITORING 2022-23**

**Purpose of the Report**

1. To present budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2022-23 as at 30 November 2022.

**Main Considerations**

2. Appendix 1 to this report outlines the budget monitoring summary as at 30 November 2022.
3. An overspend of £9.325 million is currently projected against the overall schools budget which is a small increase since last month. Children not being in school and able to be assessed during the pandemic and the inevitable impact of lockdown on children has meant the number of plans issued has exceeded pre-pandemic rates and it is anticipated the full year impact of this will be felt in future years. The detailed budget monitoring report is shown in Appendix 1.

***Early Years Budgets (Budget £31.047M, forecast variance (£2.257M))***

4. Although this is forecast, it is anticipated that the DfE's post financial year adjustment will adjust for this in whole or, part in the 2023-24 financial year if the January 2023 census numbers fall.

	<b>Budgeted PTE</b>	<b>Forecast PTE</b>	<b>Forecast PTE Variance</b>	<b>Budgeted Spend £M</b>	<b>Forecast Spend £M</b>	<b>Forecast spend Variance £M</b>
3- & 4-year olds	10,738	9,783	(955)	27.055	24.877	(2.178)
2-year-olds	828	793	(35)	2.686	2.574	(0.112)
ISF	2,826 (hours)	3,240 (hours)	414 (hours)	0.537	0.616	0.079

**COMF Grant Funding**

5. Early Years officers have been successful with a 2022-23 bid to the Director of Public Health to facilitate containment of the virus as below.
  - a. Payment to open or partially open settings - funded and non-funded provision; a one-off grant to support purchase of PPE and increased cleaning costs. £0.370 million.
  - b. Deep cleaning and hardship fund – available for applications of support £0.100.

**Schools Budgets (Budget £326.966M, forecast variance (£0.179M))**

6. The forecast underspend on schools largely relates to the school supply cover fund and alternative grants being used to fund service teams which currently shows a forecast underspend and is helping to offset the overall pressure on the DSG.

**High Needs Budgets (Budget £66.351M, forecast variance £12.182M)**

7. High Needs budgets are projected to overspend by £12.182m. The biggest areas of overspend are Independent Special School packages, alternative provision, named pupil allowances and top ups. When the level of funding available does not match the local needs, the budget cannot be set at an achievable level and so the location of the overspend is not an indication of individual budget issues but that the whole block is under significant pressure.
8. Following the pandemic, when professionals could not assess children and young people in school, EHC assessments were delayed due to inevitable backlog. Whilst we have put in place temporary support funding to support learners, we continue to see increases in requests for assessment for plans, and our assumptions around future plans will need constant adjustment to be as accurate as possible.
9. The major driver of the increased cost is volume. Activity (volume) is measured in FTE – full time equivalent pupils. Variance analysis is provided at Appendix 2. Please note the lower growth rate of EHCPs than in previous years in the table below.

	<b>Children with an EHCP in Wiltshire</b>	<b>Prior Year Data (2021-22)</b>
Number as at 1 April 2022	4,371	(01/4/21) – 4,118
As at 30 November 2022	4,740	(31/8/21) – 4,242
Forecast demand to 31 March 2023 (based on historical trend)	4,945	(31/3/22) – 4,371
Annual movement	<b>574 (13.1% increase)</b>	<b>253 (6.1% increase)</b>

10. As Schools Forum are aware, much work has been done, over recent years to investigate and address the issues. More detail is reported regularly through the high needs working group update from the Director, Education and Skills and Head of Inclusion & SEN.

**Central School Services Block (Budget £2.344M, forecast variance (£0.421M))**

11. There is a small forecast underspend in this area driven by careful management of the specialist education packages for children in care as well as alternative external grant funding.

**DSG Reserve**

12. The reserve brought forward of £25.973 million is increased by the positive early years block adjustment of £0.564 million. The forecast overspend would take the reserve into a deficit position of £34.734 million.
13. The local authority is working closely with the DfE Developing Better Value partners CIPFA and Newton to enhance our current plans, adding insight from other local authority action plans and offering the opportunity to bid for transformational funding.

14. The early years reference group have considered limited one-off usage of the early years contingency to support children for school readiness and support for vulnerable early years pupils with additional needs. The proposed expenditure is 4fte temporary (2 year contracts) early years intervention advisers, estimated cost £0.190m, Inclusion Support for settings including outreach from and mentoring / training including showcasing videos of staff working with children together with an Early Years Conference in the summer or Autumn term with a focus on inclusion for early years professionals, linked to an early years recruitment campaign. This will assist with COVID recovery for children and also contribute to the early help and prevention agenda.

<b>DSG Reserve</b>	<b>Early Years Ringfence (effective 01-04-22)</b>	<b>Schools Block, HNB &amp; Central</b>	<b>Total 22/23 FY</b>
Balance Brought Forward from 21/22	-1.692	27.665	25.973
Early Years Adjustment 21/22 prior year	-0.564		-0.564
Forecast variance 22/23	-2.257	11.582	9.325
Estimated balance CFWD 2022	<b>-4.513</b>	<b>39.247</b>	<b>34.734</b>

### **Proposals**

15. Schools Forum is asked to note the budget monitoring position at the end of November 2022 in conjunction with the high needs recovery plan and Developing Better Value (DBV) update later in the agenda.

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Appendix 1 – Schools Budget Forecast Position as at 30th November 2022

a	b	c	d = (c-b)	e = (d/b)	f	d = (c-b)	g
Service Area	Current Annual Budget £m	Period 8 Forecast £m	Period 8 Forecast Variance £m	%	21/22 Outturn Variance	October forecast variance £m	Budget Move- ment from Previous Report
Three to Four Year Olds EY Entitlement Funding	27.055	24.877	(2.178)	-8.05%	(2.004)	(2.190)	0.011
Two Year Olds EY Entitlement Funding	2.686	2.574	(0.112)	-4.17%	0.111	(0.225)	0.113
Early Years Inclusion Support Fund	0.537	0.616	0.079	14.63%	0.089	0.079	0.000
Early Years Pupil Premium & DAF	0.339	0.307	(0.032)	-9.46%	(0.049)	(0.032)	0.000
Early Years Central Expenditure	0.430	0.417	(0.013)	-3.03%	(0.032)	(0.017)	0.004
<b>Early Years Block</b>	<b>31.047</b>	<b>28.790</b>	<b>-2.257</b>	<b>-7.27%</b>	<b>-1.885</b>	<b>-2.386</b>	<b>0.129</b>
Schools Budget Shares Primary & Secondary - Local Authority Schools	112.179	112.179	0.000	0.00%	0.000	0.000	0.000
Schools Budget Shares Primary & Secondary - Academy Schools	211.575	211.575	0.000	0.00%	0.000	0.000	0.000
Education Functions	0.230	0.230	0.000	0.00%	0.000	0.000	0.000
Licences and Subscriptions	0.055	0.040	(0.015)	-27.49%	0.002	(0.015)	0.000
Free School Meals	0.029	0.029	0.000	0.00%	0.000	0.000	0.000
Staff Supply Cover (Not Sickness)	0.641	0.547	(0.094)	-14.72%	(0.091)	(0.094)	0.000
Behaviour Support Team	0.665	0.665	0.000	0.00%	0.000	0.000	0.000
Ethnic Minority and Traveller Achievement	0.565	0.503	(0.061)	-10.88%	(0.061)	(0.024)	-0.038
<b>De Delegated Total</b>	<b>1.954</b>	<b>1.783</b>	<b>-0.171</b>	<b>-8.74%</b>	<b>-0.150</b>	<b>-0.133</b>	<b>-0.038</b>
Growth Fund	1.029	1.021	(0.008)	-0.79%	(0.795)	(0.008)	0.000
<b>Schools Block</b>	<b>326.966</b>	<b>326.787</b>	<b>-0.179</b>	<b>-0.05%</b>	<b>-0.795</b>	<b>-0.141</b>	<b>-0.038</b>
Special School Place Funding	8.337	8.337	0.000	0.00%	0.000	0.000	0.000
Resource Base (RB) Funding	1.975	1.975	0.000	0.00%	0.000	0.000	0.000
Enhanced Learning Provision (ELP) Funding	1.793	1.793	0.000	0.00%	0.000	0.000	0.000
<b>High Needs Block (all schools)</b>	<b>12.105</b>	<b>12.105</b>	<b>0.000</b>	<b>0.00%</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
Named Pupil Allowances (NPA)	6.733	8.099	1.366	20.29%	1.093	1.366	0.000
Special School Top-Up	8.626	10.141	1.515	17.56%	1.664	1.515	-0.000
Resourced Base (RB) Top-Up	1.982	3.113	1.131	57.08%	0.206	1.029	0.103
Enhanced Learning Provision (ELP) Top-Up	2.420	2.577	0.157	6.47%	1.163	0.077	0.080
Estimate of Transitional Support (TSP) payments	1.000	1.262	0.262	26.24%	0.459	0.218	0.045
Secondary Alternative Provision Funding	2.875	2.875	0.000	0.00%	0.000	0.000	0.000
Non Wiltshire Pupils in Wiltshire Schools	0.000	0.000	0.000	0.00%	(0.029)	0.000	0.000
<b>Devolved to Maintained &amp; Top Up Total</b>	<b>23.636</b>	<b>28.067</b>	<b>4.431</b>	<b>18.75%</b>	<b>4.555</b>	<b>4.204</b>	<b>0.227</b>
Wiltshire College Places	2.118	2.118	0.000	0.00%	0.000	0.000	0.000
Wiltshire Pupils in Non Wiltshire Schools	2.393	3.314	0.920	38.45%	0.775	0.940	-0.019
Post-16 Top-Up	6.157	6.546	0.389	6.32%	3.050	0.389	0.000
Independent & Non-Maintained Special Schools	11.583	15.636	4.053	34.99%	1.627	3.768	0.284
SEN Alternative Provision, Direct Payments & Elective Home Education	2.370	4.932	2.561	108.06%	0.308	2.561	0.000
Education Other than at School (EOTAS)	0.491	0.438	(0.053)	-10.73%	(0.066)	(0.007)	-0.046
<b>Funding for Places outside Schools</b>	<b>25.113</b>	<b>32.984</b>	<b>7.871</b>	<b>31.34%</b>	<b>5.695</b>	<b>7.652</b>	<b>0.219</b>
High Needs in Early Years Provision	0.454	0.454	0.000	0.00%	(0.032)	0.000	0.000
Speech & Language	0.564	0.551	(0.014)	-2.42%	(0.015)	(0.014)	0.000
SEND Business Support	0.115	0.119	0.004	3.33%	0.000	0.004	-0.000
0-25 Inclusion & SEND Teams	2.564	2.571	0.007	0.27%	(0.206)	(0.010)	0.017
Specialist Teacher Advisory Service	1.390	1.274	(0.117)	-8.38%	(0.132)	(0.016)	-0.101
Other Special Education	0.409	0.409	0.000	0.00%	(0.149)	0.000	0.000
<b>Commissioned &amp; SEN Support Services</b>	<b>5.497</b>	<b>5.377</b>	<b>-0.120</b>	<b>-2.17%</b>	<b>-0.533</b>	<b>-0.035</b>	<b>-0.084</b>
<b>High Needs Block</b>	<b>66.351</b>	<b>78.533</b>	<b>12.182</b>	<b>18.36%</b>	<b>9.717</b>	<b>11.820</b>	<b>0.362</b>
Central Licences	0.409	0.409	(0.000)	0.00%	0.000	(0.000)	0.000
Central Provision (Former ESG)	1.191	0.815	(0.376)	-31.59%	0.266	0.012	-0.388
Admissions	0.447	0.455	0.008	1.87%	(0.015)	0.007	0.001
Servicing of Schools Forums	0.003	0.003	0.000	0.00%	0.000	0.000	0.000
<b>Central Provision within Schools Budget</b>	<b>2.050</b>	<b>1.682</b>	<b>-0.368</b>	<b>-17.94%</b>	<b>0.251</b>	<b>0.019</b>	<b>-0.387</b>
Education Services to CLA	0.103	0.050	(0.053)	-51.46%	(0.081)	(0.053)	0.000
Child Protection in Schools & Early Years	0.058	0.058	0.000	0.00%	0.000	0.000	0.000
Prudential Borrowing	0.133	0.133	0.000	0.00%	0.000	0.000	0.000
<b>Historic Commitments</b>	<b>0.294</b>	<b>0.241</b>	<b>-0.053</b>	<b>-18.03%</b>	<b>-0.081</b>	<b>-0.053</b>	<b>0.000</b>
<b>Central School Services</b>	<b>2.344</b>	<b>1.923</b>	<b>-0.421</b>	<b>-17.96%</b>	<b>0.170</b>	<b>-0.034</b>	<b>-0.387</b>
<b>Total Schools Budget</b>	<b>426.708</b>	<b>436.033</b>	<b>9.325</b>	<b>2.19%</b>	<b>7.056</b>	<b>9.260</b>	<b>0.065</b>
Pupil Premium (academy & maintained)	15.284	15.284	0.000	0	0	0	Academy & Maintained school (excl CiC)
6th Form Funding Maintained Schools (LSC Grant)	1.118	1.118	0.000	0	0	0	Maintained schools only
UI Free School Meal Grant Provisional (academy & maintained)	5.543	5.543	0.000	0	0	0	Figure provided by DW
PE & Sports Revenue Grant (academy & maintained)	1.508	1.508	0.000	0	0	0	Figure provided by DW
<b>DfE Revenue Grants for all Wiltshire Schools</b>	<b>23.452</b>	<b>23.452</b>	<b>0.000</b>	<b>0</b>			
<b>TOTAL DfE SCHOOLS FUNDING</b>	<b>450.160</b>	<b>459.485</b>	<b>9.325</b>	<b>2.07%</b>			

Appendix 1 - the service forecasts of expenditure as at 30th November 2022 - this is an estimate of net expenditure on the schools budget

Appendix 2 - the service forecasts of planned activity in FTE (full time equivalent pupils) as at 30th April 2022- this is a measure of volumes of pupil placements / support arrangements

Appendix 2 - Variance Analysis

<i>h</i>	<i>i</i>	<i>j</i>	$k = (j-i)$	$l = (k/i)$	<i>m</i>	<i>n</i>	<i>o</i>	<i>n</i>	<i>o</i>
Volume analysis	Budgeted Activity FTE	Period 8 Forecasted Activity FTE	Period 8 Forecasted FTE	Period 8 Forecasted Variance %	21/22 Outturn Volume	Volume movement from Previous Report	Forecast Average Prices	21/22 Actual Average Prices	Unit
Three/Four Year Olds	10,738	9,783	(955)	-9%	9,721	4	£4.42	£4.25	p/hr
Two Year Olds	828	793	(35)	-4%	828	34	£5.69	£5.48	p/hr
ISF	2,826	3,240	414	0%	0	-	£190	£615	per child
							£0.53	£0.53	pa
<b>Early Years Block ACTIVITY DRIVER DATASET</b>	<b>14,392</b>	<b>13,816</b>	<b>(576)</b>	<b>-4%</b>	<b>10,549</b>	<b>38</b>			
Sp Sch Place Funding	862	862	0	0%	806	-	£9,671	£10,000	pa
RB Funding	335	335	0	0%	329	-	£5,897	£6,000	pa
ELP Funding	301	301	0	0%	315	0	£5,965	£6,000	pa
	<b>1,498</b>	<b>1,498</b>	<b>0</b>	<b>0%</b>	<b>1,449</b>	<b>0</b>			
NPA	1,537	1,547	10	1%	1,215	0	£5,234	£6,235	pa
Special School Top-Up	799	929	130	16%	872	0	£10,913	£11,370	pa
RB Top-Up	330	438	108	33%	383	0	£7,106	£5,800	pa
ELP Top-Up	513	507	(6)	-1%	444	0	£5,086	£6,374	pa
TSP		106	106	0%	95	0	£11,906	£4,325	pa
	<b>3,179</b>	<b>3,527</b>	<b>348</b>	<b>11%</b>	<b>3,009</b>	<b>0</b>	<b>£7,957</b>	<b>£8,539</b>	pa
Wiltshire College Places	353	353	0	0%	350	-	£6,000	£6,000	pa
Non Wiltshire Schools	178	234	56	32%	216	0	£14,160	£13,196	pa
Post-16 Top-Up	568	694	126	22%	544	0	£9,433	£10,629	pa
Ind & Non-Maint Sp Sch	219	282	63	29%	259	0	£55,401	£52,022	pa
SEN AP, DP & EHE	172	393	221	128%	197	0	£12,561	£13,185	pa
	<b>1,490</b>	<b>1,956</b>	<b>466</b>	<b>31%</b>	<b>1,566</b>	<b>0</b>	<b>£16,864</b>	<b>£17,415</b>	pa
<b>High Needs Block ACTIVITY DRIVER DATASET</b>	<b>6,167</b>	<b>6,981</b>	<b>814</b>	<b>13%</b>	<b>6,024</b>	<b>0</b>	<b>£11,250</b>	<b>£11,522</b>	

The total activity FTE is higher than total no of EHCPS as children in SS, ELP & RB may also have top ups  
SS, ELP & RB places above those agreed with the DfE are costed to top ups

**Wiltshire Council**

**School Funding & SEN Working Group**  
**9 January 2023**

**Schools Forum**  
**19 January 2023**

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## **Additional School Capital Funding for 2022-23 - Funding & Methodology**

### **Purpose of the Paper**

1. At the December 2022 Schools Forum meeting, members were advised that additional Capital funding was being made available to schools for the 2022-23 year, however there was limited detail at that point.
2. This paper serves to update Schools Forum and outline the level of additional funding and how it will be allocated to schools in the 2022-23 year.

### **Introduction to Additional Capital Funding for 2022-23**

3. In December, the Department for Education (DfE) announced an additional £500m of capital funding for schools and further education institutions for the 2022-23 year. The additional funding is for all schools that currently receive Devolved Formula Capital (DFC) allocations.
4. The DfE confirmed that the funding must be spent on Capital projects but prioritising projects that improve a school estate's energy efficiency. Where the school judge this is not appropriate based on local circumstances, schools have discretion to spend this on other capital projects. The DfE have issued [guidance](#) to schools on improving their energy efficiency and reducing energy costs.
5. Whilst the DfE expect schools to spend the additional grant in the 2022-23 year, the funding can be carried forward into 2023-24 year as it is subject to the same conditions as all DFC allocations, which allow for any unspent grant to be carried forward.
6. Payment of the additional DFC grant to schools should have been made in late December 2022 / early January 2023.

## School Funding Rates

7. Funding will be allocated to schools using a very simple formula which comprises the following three elements.
  - A basic rate per pupil calculated at £20.06 per 'weighted pupil' – pupil numbers are taken from the Spring 2021 census and weighted based upon their phase of education as below
    - Primary – weighting of 1.0 per pupil
    - Secondary – weighting of 1.5 per pupil
    - Post-16 – weighting of 2.0 per pupil
    - Special – weighting of 4.5 per pupil
    - PFI Schools – weighting of 0.5 per pupil
  - A lump sum element paid to all schools (irrespective of size) - £10,000
  - An uplift of 8% for Voluntary Aided (VA) Schools
  
8. The example below sets out how the funding is calculated.

$$\mathbf{\pounds 10,000 + (\pounds 20.06 \times \text{Weighted Pupil Numbers}) \times \text{VA Factor}}$$

Each school receives a fixed sum of £10,000 and a variable amount based on their weighted pupil numbers.

For example, a school with 50 primary pupils and 500 secondary pupils would be treated as having  $(50 \times 1) + (500 \times 1.5) = 800$  weighted pupils.

The school would receive  $800 \times \pounds 20.06 = \pounds 16,048$ , in addition to the per-school sum of £10,000, to give a total allocation of £26,048.

If the school were a VA school, then the VA factor of  $\times 1.08$  would be applied to give a total of £17,332.

## The VA Factor

9. The VA factor is specific to Voluntary Aided schools. VA governing bodies are legally responsible for their own capital works. The Secretary of State may assist, but by law can contribute no more than 90% of costs. Therefore, the DfE deduct 10% from VA allocations for DFC. The VA schools do not have access to a VAT refund scheme and so the DfE increase their allocations to reflect this, by uplifting by 20% for the VAT element. The net impact is a VA factor of  $\times 1.08$ , which in effect increases their DFC allocation by 8%.

10. Local authorities (LAs) receive the DFC allocations for maintained schools and then pass on these allocations to the schools. Academy trusts, VA bodies (Diocese), and other institutions receive their DFC directly from the DfE.

## **Proposal**

11. Schools Forum is asked to note the report.

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## Wiltshire Council

School Funding & SEN Working Group  
9 January 2023

Schools Forum  
19 January 2023

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### Schools Revenue Funding 2023-24 - Funding Settlement & Budget Setting Process

#### Purpose of the Paper

1. To update Schools Forum on the revenue funding settlement and the budget setting process for 2023-24.
2. The report will outline the funding settlement announced on 16 December 2022 and the impact on school budgets arising from the settlement. The report will also outline the decision-making process for the 2023-24 budget.
3. Further detail on each of the funding Blocks and the specific decisions required will be provided in separate papers on this agenda. A separate decision paper will also be provided so that decisions can be considered after all the update reports have been discussed.

#### Introduction to Funding Changes for 2023-24

4. In the Autumn of 2019, the government announced its pledge to boost schools and high needs funding, affectionately referred to as '*the Boris Billions*'. Building on the 2019-20 funding levels, the cash increases of £14.5 billion over 3 years would comprise;
  - £2.6 billion in 2020-21
  - £4.8 billion in 2021-22 (increase by £2.2bn)
  - £7.1 billion in 2022-23 (increase by £2.3bn)
5. In addition, a further £700million was pledged for High Needs nationally in 2020-21, a further £730m for 2021-22 and £780m for 2022-23.
6. The 2023-24 year represents another year where the Government has pledged to boost schools funding, with an increase of £2.3bn into the overall Schools Block compared to the 2022-23 year. In addition, a further £400m has been pledged for High Needs in the 2023-24 year.
7. In the Chancellor's Autumn Statement, a further cost of living supplementary grant, the '*Mainstream Schools Additional Grant*' was announced, providing a further £2bn of funding for schools. Details of this grant are contained in a separate paper.

8. The DfE will allocate school funding on the basis of the National Funding Formula (NFF) to local authorities. The funding is then run through the local funding formula, taking account of Schools Forum decisions to create individual school budgets. The Schools Block of the Dedicated Schools Grant (DSG) has been awarded an increase of 2.4% for the core funding factors and 4.3% for Deprivation factors compared to the 2022-23 year.
9. The school's block of funding has incorporated the 2022-23 Schools Supplementary Grant funding rates and these are now baselined into the NFF rates.
10. The 2023-24 year is another 'soft' year with local Schools' Forum still retaining its role in determining the school funding allocation methodology. The DfE have confirmed their intention to move to a 'hard' national funding formula and are proposing a move to the full hard formula by 2027-28. In the meantime, there will be a tightening towards the full NFF.
11. The introduction of mandatory minimum per pupil funding levels for the 2020-21 year have been continued and the rates have increased for the 2023-24 year as detailed in the table below.

<b><u>MPPFL</u></b>	<b><u>2020-21</u></b>	<b><u>2021-22</u></b>	<b><u>2022-23</u></b>	<b><u>2023-24</u></b>
Key Stage 1&2	£3,750	£4,180*	£4,265	£4,405
Key Stage 3	£4,800	£5,215*	£5,321	£5,503
Key Stage 4	£5,300	£5,715*	£5,831	£6,033

\* - Includes Teachers Pay and Pension element of £180 KS1&2 and £265 KS3&4

12. The mandatory minimum per pupil funding levels represents a step towards the introduction of a 'hard' or 'direct' NFF, which is proposed from 2027-28.
13. The Minimum Funding Guarantee (MFG) threshold has been adjusted to ensure that all schools gain through the allocations per pupil and must be set between 0.0% and +0.5%.
14. The main formula for the 2023-24 year is broadly similar to the formula for the 2022-23 year however there are some changes, as detailed below.
  - a. Overall, funding through the NFF has increased by 1.9%
  - b. Core pupil-led funding factors and the lump sum increased by 2.4%
  - c. Disadvantaged funding, FSM6 and IDACI factors increased by 4.3%



- d. The 'Minimum per pupil funding level' to increased by 3.3% to;
    - i. £4,405 for Primary
    - ii. £5,715 for Secondary
  - e. The Free School Meals factor (for the costs of providing a meal for eligible pupils) has increased by 2%
  - f. A transfer of up to 0.5% of Schools Block funding to the High Needs Block is permitted, subject to Schools Forum approval
  - g. All NFF factors must be used in the formula
  - h. The LAMB grant will be phased out completely and local authorities are able to de-delegate funding from maintained schools only, to support school improvement
15. Following the cancellation of the 2020 and 2021 school assessments due to Covid-19, the Low Prior Attainment data from 2019 will continue to be used as a proxy for the assessments which would have taken place in 2020 and 2021.
16. The DfE will continue to pay Business Rates on behalf of all schools (introduced in 2022-23) onwards. The Department for Education will liaise directly with Wiltshire Council for the payment of Business Rates, removing the need for schools to pay their own Business rates and then recovering the funding.
17. Pupil Premium Grant (PPG) funding will continue in the 2023-24 year, with the rates being uplifted from the current 2022-23 rates, by 5%. The DfE have confirmed that the numbers of eligible PPG pupils will be taken from the October 2022 census. The funding rates for 2023-24 are set out in the table below.

<u>Premium</u>	<u>Primary</u>		<u>Secondary</u>	
<b>Year</b>	<b>2022-23</b>	<b>2023-24</b>	<b>2022-23</b>	<b>2023-24</b>
FSM6 (Deprivation)	£1,385	<b>£1,455</b>	£985	<b>£1,035</b>
LAC and Post-LAC*	£2,410	<b>£2,530</b>	£2,410	<b>£2,530</b>
Service	£320	<b>£335</b>	£320	<b>£335</b>

\* - LAC PPG is payable to the LA's Virtual Headteacher. Where a pupil has previously been LAC but has left LA care through adoption, special guardianship order or child arrangements order, then the PPG is payable to the school.

## School Revenue Funding Settlement 2023-24

### Dedicated Schools Grant 2023-24

18. The DfE issued the revenue funding settlement for schools on 16 December 2022. The provisional Dedicated Schools Grant (DSG) allocation for Wiltshire Council is **£452.297m**. This is an increase of **£29.887m** compared with 2022-23. The table below shows the breakdown of the Blocks.

<b>Block</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>
Schools Block	£317,724,345	£328,593,782	£346,293,208
Central Block	£2,565,122	£2,604,175	£2,600,176
High Needs Block	£57,835,120	£62,690,534	£70,917,828*
Early Years Block	£28,217,273	£28,520,960	£32,485,360
<b>TOTAL FUNDING</b>	<b>£406,341,860</b>	<b>£422,409,451</b>	<b>£452,296,572</b>

\* Includes Additional High Needs Allocation in 23-24 of £2.942m (Chancellor's Autumn Statement)

19. The increase reflects the impact of the uplift to the Schools' and High Needs Blocks incorporating the additional funding pledged by the government.
20. The increase in the Schools Block reflects the core increase and the additional funding from the Schools Supplementary Grant in 2022-23 of £9.6m in 2022-23.
21. The split of funding between the Blocks is set out below to show the year-on-year movements.

	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>Increase</b>	<b>(%)</b>
Schools Block	275,215,164	293,142,767	317,724,345	328,593,782	<b>346,293,208</b>	<b>17,699,426</b>	<b>5.39%</b>
Central Block	2,570,343	2,479,715	2,565,122	2,604,175	<b>2,600,176</b>	<b>-3,999</b>	<b>-0.15%</b>
High Needs Block	47,091,825	51,996,188	57,835,120	62,690,534	<b>70,917,828</b>	<b>8,227,294</b>	<b>13.1%</b>
Early Years Block	26,768,825	26,884,359	28,217,273	28,520,960	<b>32,485,360</b>	<b>3,964,400</b>	<b>13.9%</b>
<b>TOTAL FUNDING</b>	<b>351,646,157</b>	<b>374,503,029</b>	<b>406,341,860</b>	<b>422,409,451</b>	<b>452,296,572</b>	<b>29,887,121</b>	<b>7.07%</b>

22. The **Schools Block** has been calculated based on the NFF funding factor values published in July 2022 and applied to the October 2022 census information. These have been used to calculate a PUF and SUF (primary unit of funding and secondary unit of funding) for Wiltshire. These units of funding have been multiplied by the numbers of primary and secondary pupils to arrive at the Schools' Block total for

2023-24. (In 2023-24, the rates include the Schools Supplementary Grant funding rates from the 2022-23 year.)

23. The PUF and SUF rates for 2023-24 are detailed in the table below;

	2019-20	2020-21	2021-22	2022-23	2023-24	Increase / %
<b>PUF</b>	£3,849.15	£4,079.69	£4,432.68	£4,574.45	<b>£4,801.29</b>	<b>£226.84 / 5.0%</b>
<b>SUF</b>	£4,885.94	£5,092.09	£5,514.14	£5,659.78	<b>£5,951.59</b>	<b>£291.81 / 5.1%</b>

24. Pupil numbers have moved in each phase, as per the table below:

	<u>2018-19</u>	<u>Inc.</u>	<u>2019-20</u>	<u>Inc.</u>	<u>2020-21</u>	<u>Inc.</u>	<u>2021-22</u>	<u>Inc.</u>	<u>2022-23</u>	<u>Inc.</u>	<u>2023-24</u>
Primary	38,218	15	38,233	262	38,495	-45	38,450	-297	38,153	-566	<b>37,587</b>
Secondary	24,471	412	24,883	481	25,364	242	25,606	487	26,093	675	<b>26,768</b>
<b>TOTAL</b>	<b>62,689</b>	<b>427</b>	<b>63,116</b>	<b>743</b>	<b>63,859</b>	<b>197</b>	<b>64,056</b>	<b>290</b>	<b>64,246</b>	<b>109</b>	<b>64,355</b>

25. Included within the Schools Block of funding of £346.293m is the amount of £1.964m allocated on the basis of pupil growth within Wiltshire. A breakdown of the elements comprising the Schools' Block is detailed in the table below.

<b>Funding 2023-24</b>	<b>Amount £</b>
Core funding	£344,328,861
Growth funding	£1,964,347
<b>Total Funding</b>	<b>£346,293,208</b>

26. The **Central Schools Services Block** (CSSB) has been calculated according to the national funding formula for the CSSB. October 2022 pupil numbers have been multiplied by a unit value of £36.75 and a headcount of 64,355. Funding for agreed historic commitments has then been added to that total. The Block is calculated as;

Pupil Funding (£36.75 x 64,355)	£2,365,065
Historic Commitment Funding	£235,111
<b>Total CSSB Funding</b>	<b>£2,600,176</b>

27. The **High Needs Block** has been allocated as per the baselines notified to local authorities in December 2022. These baselines are calculated according to the NFF for high needs, a significant percentage of which is allocated according to historic spend. The basic entitlement amount reflects the numbers of pupils in special schools has been updated to reflect the October 2022 census and the import/export adjustment. The uplifted funding reflects and includes Wiltshire’s share of the £400m additional funding announced for High Needs in 2023-24 and the additional high needs allocation of £2.941m.
28. The **Early Years Block** reflects the indicative hourly rates announced for 2023-24 and an estimate of the full year effect of the entitlement to an additional 15 hours of childcare for children of working parents which came into effect in September 2017. Again, Wiltshire remains on the funding floor for the early years national funding formula. It should be noted that the Early Years Block would ordinarily be updated during the 2023-24 financial year to reflect the January 2023 and January 2024 early years census data.

### **Block Transfers 2023-24**

29. The funding regulations do allow for a transfer of funding between the Schools’ Block and other Blocks within the DSG. Local authorities have the flexibility to move up to 0.5% from the Schools’ Block to the other Blocks including the High Needs Block, with the agreement of Schools Forum. It has previously been agreed by Schools Forum that a transfer up to a maximum of 0.5% would be supported, if affordable. Due to the Secretary of State’s previous decisions regarding transfers and the requirement to passport 99.5% of the Schools’ Block of funding to schools, a Disapplication Request to transfer a sum greater than 0.5% has not been submitted.

### **Budget Setting Process 2023-24**

30. Local authorities are required to submit the proposed delegated budget for schools in their areas to the DfE by 20 January 2023. The DfE are required to confirm the formula is compliant with the funding regulations and will then confirm budgets to academies by the end of February 2023. The LA is required to notify maintained schools of their budget shares by the end of February 2023.
31. In terms of setting the budgets for schools for 2023-24, the amount of funding available for distribution to schools is calculated as follows:

DSG Schools Block Allocation	346,293,208
Less: Growth Fund	x,xxx,xxx
Less: Transfer to Other Blocks	x,xxx,xxx
Total available for School Funding	<b>xxx,xxx,xxx</b>

32. The update reports will show that many of the decisions in relation to individual funding Blocks will impact on the affordability, or otherwise, of other proposals and this will be important to take into account when considering the final decision paper.

### **De-Delegation**

33. There are a number of budgets that maintained primary and secondary schools can agree to de-delegate so that services continue to be provided centrally. De-delegation cannot be applied to amounts delegated to academies or special schools.
34. At the December 2022 Schools Forum meeting, it was agreed by the maintained schools voting members that the de-delegation of services would continue in 2023-24, as in 2022-23. The amount of each de-delegated service budget is based upon the relevant formula factors for maintained schools.
35. In addition, it was agreed that maintained schools would de-delegate funding to support school improvement services, previously funded from the LAMB grant, which will be phased out from April 2023.

### **Proposal**

36. Schools Forum is asked to note the report.

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7. The allocations for the free entitlement for 3- and 4-year olds, and for 2-year olds are based on the January 2022 census and will be updated during the 2023-24 financial year for the January 2023 census. In order to follow the accounting concept of prudence, the budget must be set within initial allocations.
8. The *operational guidance for early years entitlements: local authority funding of providers 2023-24* was published in December 2022. The **key points** on local authority funding of providers are that local authorities:
  - should set a single funding rate (including the same base rate and supplements) for both entitlements for 3- and 4-year olds (that is, both the universal 15 hours, and the additional 15 hours for working parents)
  - must plan to pass on at least 95% of their 3 and 4-year-old funding directly to providers to deliver the 3 and 4-year-old entitlements
  - The remaining 5% must be spent on:
    - Centrally retained funding (early years teams)
    - Any transfers to 2 years olds
    - Any extra hours in addition to the governments' entitlement
    - Any funding movement out of early years block
  - may request that the 95% requirement be disapplied in specific, exceptional circumstances
  - must now use a universal base rate for all types of provider in their local 3 and 4-year-old formula, including for Maintained Nursery Schools
  - may continue to use 'lump sums' to distribute additional funding to Maintained Nursery Schools
  - must use a deprivation supplement in their local 3 and 4-year-old formula, and any other supplements used must fall within one of the allowable categories
  - must not channel more than 10% of their funding for 3 and 4 olds through funding supplements
  - must provide a Special Educational Needs Inclusion Fund (SENIF) for 3- and 4-year olds, this can also include 2-year olds.
  - must pass on Disability Access Fund (DAF) funding in full to providers for eligible 3- and 4-year olds which should be used for example, to support providers in making reasonable adjustments to their settings or helping with building capacity.
  - must pass on Early Years Pupil Premium (EYPP) in full to providers for eligible 3- and 4-year olds and is only payable in the universal 15 hours entitlement.
9. The DfE will monitor compliance with these requirements. Wiltshire is already compliant with the requirements of the formula, and the SEN Inclusion Fund, and there are no current circumstances where a disapplication of the 95% requirement is being recommended.
10. There are no pass-through requirements for the 2-year-old funding and no requirements for compulsory supplements. Local authorities are encouraged to fund providers for the entitlement for disadvantaged 2-year olds on the basis of a flat hourly rate for all providers. Wiltshire is compliant with this approach and proposes to pass through 100% of the 2-year-old funding to providers.
11. There are no major changes identified by the DfE in their operational guide although there were some relatively minor changes to the funding formula following a DfE consultation in 2022.



## Funding Rates for Wiltshire

12. The early years reference group (EYRG) met on the 6<sup>th</sup> January 2022 and considered a number of funding options attached as Appendix 1. The consensus of the group was to support the local authority recommendation

- passport in full the 2-year-old disadvantaged rate of £5.75 per entitled hour an increase of 6p on the previous year and
- to set the 3 and 4 year old rate at £4.68 per entitled hour, an increase of 26p per hour on the previous year whilst providing a lower than usual contingency of £0.019m contingency to absorb any increases in children throughout 2023-24 financial year. In this way, the funding increases are passed on in full, recognising the challenging business environment settings are operating in of increased wages, energy costs and recruitment and retention challenges.

13. Rurality and deprivation have been increased slightly in line with forecast spend for 2022-23 financial year although actual allocations for both deprivation and rurality will be unknown until March when the IDACI report is available.

<b>Provider Rates</b>	<b>PTE (where applicable)</b>	<b>2021-22 Wiltshire Rate</b>	<b>Proposed 2023-24 Wiltshire Rate</b>	<b>£ million</b>
3 & 4-year-old entitlement (all)	10,596	£4.42/hour	£4.68/hour	28.285*
2-year-old entitlement	671	£5.69/hour	£5.75/hour	2.714
Deprivation, rurality				0.300
Central EY functions				0.468
EY Inclusion Support Fund				0.359
Disability Access Fund	212 children	£800/child	£828/child	0.176
Early Years Pupil Premium	519 children	£0.60/hour	£0.62/hour	0.183
<b>Total proposed budget for 2023-24</b>				<b>32.485</b>

\*includes £0.019million contingency

## Early Years Inclusion Funding

14. As part of the preventative inclusive agenda and as part of the recovery actions for the high needs block budget, an additional sum of £0.180 million is ringfenced from the high needs block to support longer hours of the inclusion support fund (ISF).

15. The DfE guidance is clear that local authorities should target SEN Inclusion Funds at children with lower level or emerging SEN. Children with more complex needs and those in receipt of an Education, Health and Care Plan (EHCP) continue to be eligible to receive funding via the high needs block of the DSG. With a dual funded approach, applications for all children can be assessed under one ISF system.

## Disability Access Fund

16. 3- and 4-year olds will be eligible for the fund if they meet the following criteria:

- The child is in receipt of child disability living allowance and;

- The child receives universal 15 hours entitlement
17. 4-year olds in primary school reception classes are not eligible for disability access fund (DAF) funding.
  18. Settings of 3- and 4-year olds eligible for the DAF will be entitled to receive a one-off payment of £828 per year. Children do not have to take up the full 570 hours of early education they are entitled to in order to receive DAF.
  19. Early years providers are ultimately responsible for identifying eligible children and local authorities must check that DAF eligibility requirements are met.
  20. The DAF is payable as a lump sum once a year per eligible child. If a child is splitting their entitlement between two or more providers, then parents should be asked to nominate the main setting. If a child receiving DAF moves from one setting to another within a financial year the new setting is not eligible to receive DAF for this child within the same financial year.

### **Early Years Pupil Premium**

21. Ringfenced Funding continues to be allocated through the early years block for the early years pupil premium (EYPP). The EYPP allocation is set at £0.183 million for 2023-24 and it is proposed to set the budget in line with the funding level.

### **Compliance**

22. Please refer to Appendix 2 for the calculations of compliance with the % pass through. The recommended scenario is compliant.
23. Appendix 3 is an extract from the DfE guidance showing guidance for the % pass through calculation.

### **Proposals**

24. Schools Forum is asked to note the update on the early years block and provide views on the proposals in relation to the early years single funding formula and percentage pass through to providers:
  - Local Authority preferred proposal:
    - i. to increase the current rate of 2-year-old funding to £5.75 and 3 & 4-year-old funding to £4.68 per hour
    - ii. Pay inflation be added at 9% to the central early years teams reflecting the above inflation pay increase in 22-23 and the 4.5% estimate for 23-24 financial years
    - iii. Deprivation and rurality increased to reflect current spending levels at £300,000
  - All other funding factors remain at current 2022-23 levels or, funded levels.
  - To note that the early years block is to fund the Early Years Inclusion Fund at the current level and the high needs block to allocate £0.180 million to increase support available in line with the SEN strategy around prevention.

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**Dedicated schools grant: Indicative 2023 to 2024 Early years block allocations**

Appendix 1

ENGLAND (using average rates)	2 year old disadvantaged funding					Universal & Working Parents 3&4 year old funding					TOTAL
	Funded Rate	Hours per week	Weeks in Term	PTE	Indicative funding allocation	Funded Rate	Hours per week	Weeks in Term	PTE	Indicative funding allocation	
23-24 FUNDED RATES	£6.00	15	38	131,829	450,912,347	£5.31	15	38	793,312	2,402,862,367	
									315,112	939,546,186	
				131,829	450,912,347				1,108,424	3,342,408,553	3,793,320,900
22/23 rates	£5.77					£5.06					
Increase	£0.23					£0.25					
% Increase	3.99%					4.94%					
EY Pupil Premium											40,733,044
Disability Access											21,304,440
Maintained Nursery Schools											71,346,275
<b>TOTAL OVERALL NATIONAL FUNDING</b>											<b>3,926,704,659</b>

WILTSHIRE - FUNDING RECEIVED	2 year old disadvantaged funding					Universal & Working Parents 3&4 year old funding					Total 2, 3&4 Year Old Funding
	Funded Rate	Hours per week	Weeks in Term	PTE	Indicative funding allocation	Funded Rate	Hours per week	Weeks in Term	PTE	Indicative funding allocation	
23-24 LOCAL RATES	£5.75	15	38	828.10	2,714,097.75	£4.87	15	38	7,159	19,873,918	
									3,436	9,538,382	
				828	2,714,098				10,596	29,412,300	32,126,398
22/23 rates	£5.69					£4.61					
Increase	£0.06					£0.26					
% Increase	1.05%					5.64%					
EY Pupil Premium									£0.62p ph	183426	183426
Disability Access									£828 pa	175536	175536
<b>TOTAL OVERALL FUNDING FOR WILTSHIRE</b>											<b>32,485,360</b>

0.83% of the national allocation

## Options for consultation - Early Years Reference Group

Ambition - to mirror the funded rate for 2 year olds

### Ambition - to passport the national increase

22/23 Baseline 3&4 year olds

£4.42  
 £0.26  
 £4.68

Option -decrease of 2p below national - 24p per hour increase	£4.66
Option -decrease of 1p below national - 25p per hour increase	£4.67
<b>Option 1 - mirror 26p per hour increase</b>	<b>£4.68</b>
Option 2 - increase by 1p on top of national	£4.69
Option 3 - increase by 2p on top of national	£4.70
Option 4 - increase by 3p on top of national	£4.71

WILTSHIRE	2 year old disadvantaged funding					Universal & Working Parents 3&4 year old funding					Total 2, 3&4 Year Old Funding
	Local Hourly rate	Hours per week	Weeks in Term	PTE	Indicative funding allocation	Local Hourly rate	Hours per week	Weeks in Term	PTE	Indicative funding allocation	
<b>23-24 RECOMMENDED LOCAL RATES</b>	<b>£5.75</b>	<b>15</b>	<b>38</b>	<b>828.10</b>	<b>2,714,097.75</b>	<b>£4.68</b>	<b>15</b>	<b>38</b>	<b>7,159</b>	<b>19,098,549</b>	
				<b>828</b>	<b>2,714,098</b>				<b>10,596</b>	<b>28,264,796</b>	<b>30,978,894</b>
22/23 Baseline	<b>£5.69</b>					<b>£4.42</b>					
<i>Est increase</i>	<i>£0.06</i>					<i>£0.26</i>					
<b>% Increase</b>	<b>1.05%</b>					<b>5.88%</b>					
Contingency											<b>19,867</b>
Deprivation										<b>200,000</b>	<b>200,000</b>
Rurality										<b>100,000</b>	<b>100,000</b>
Early Years Commissioning, Entitlement & Quality team											
									22/23 Base for teams	430,030	
									Pay inflation 22-23 & 23-24 (9%)	<u>38,703</u>	
										468,733	468,700
Inclusion Support Fund (ISF)											359,000
EY Pupil Premium										183,426	183,400
Disability Access										175,536	175,500
<b>TOTAL OVERALL FUNDING FOR WILTSHIRE</b>											<b>32,485,360</b>
											<b>0</b>

0.07%  
 30%  
 increase from 22/23  
 plus £180k HNB top up 22/23

## Schools Forum - January 2023

Appendix 2

### Early Years Block modelling - 23/24 Financial Year

#### Appendix 1b: Worked example of calculating the pass-through rate

Wiltshire

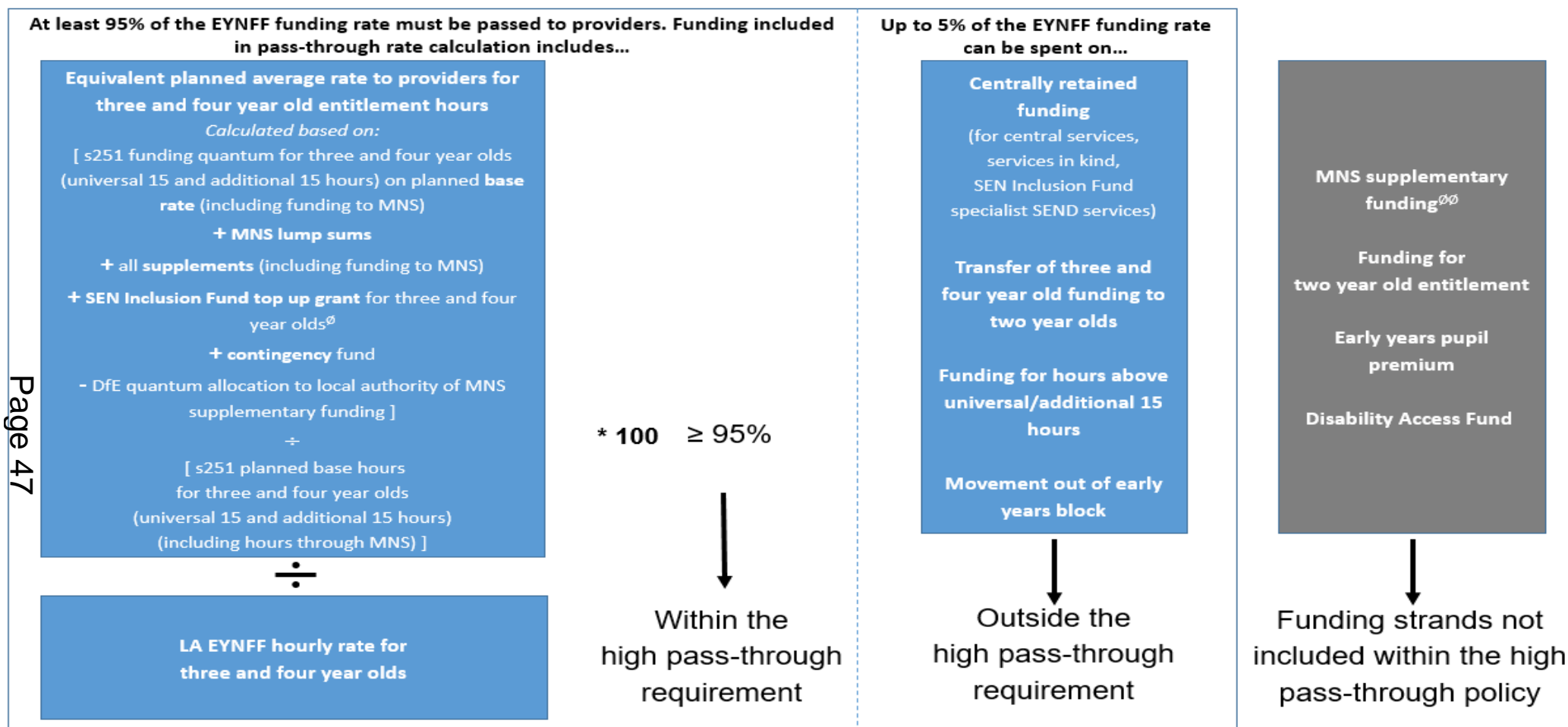
A	1	Anticipated budget for base rate (including funding to MNS) for 3 and 4 year olds	£29,412,300
	2	Anticipated budget for MNS lump sums for 3 and 4 year olds	£0
	3	Anticipated budget for supplements for 3 and 4 year olds: Deprivation (including funding to MNS)	£200,000
	4	Anticipated budget for supplements for 3 and 4 year olds: Quality (including funding to MNS)	£0
	5	Anticipated budget for supplements for 3 and 4 year olds: Flexibility (including funding to MNS)	£0
	6	Anticipated budget for supplements for 3 and 4 year olds: Rurality (including funding to MNS)	£100,000
	7	Anticipated budget for supplements for 3 and 4 year olds: EAL (including funding to MNS)	£0
	8	Anticipated budget for 3 and 4 year old SEN inclusion fund (top up grant element)	£359,000
	9	Anticipated budget for 3 and 4 year old contingency	£19,867
Subtotal =			<b>£30,091,167</b>
B	10	DfE initial quantum allocation to local authority of MNS supplementary funding	0
	11	Planned total base rate hours for universal 15 and additional 15 hours for 3 and 4 year olds	6,284,679
C	12	Equivalent average rate to providers for entitlement hours for 3 and 4 year olds = (A-B) / C = (lines 1+2+3+4+5+6+7+8+9 - 10) / (line 11)	£4.79
	13	LA EYNFF hourly rate for 3 and 4 year olds (published alongside this document, or in DSG tables in future)	£4.87
F	14	Test of meeting requirement $F = (D / E) * 100 = ((\text{line } 12) / (\text{line } 13)) * 100$	<b>98.3%</b>

The local authority is passing on 98.3% of the EYNFF hourly rate they received from central government for 3 and 4 year olds to their providers, the local authority will meet the policy requirement. To be compliant, the calculated pass-through rate must be at least . 95.0%, i.e. rounding up 94.9% will not be considered as meeting the requirement.

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**Appendix 3**

**Extract from DfE guidance: Passporting Compliance**



Page 47

<sup>∅</sup> SEN Inclusion Fund must be established by combining an amount from either one or both of their early years block and high needs block.

<sup>∅∅</sup> DfE allocated MNS supplementary funding quantum to local authority. Only the MNS funding from the EYNFF allocation is considered within the pass-through rate calculation.

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## Wiltshire Council

### Schools Funding Working Group & SEN Working Group 9 January 2023

### Schools Forum 19 January 2023

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## **DEDICATED SCHOOLS BUDGET – CENTRAL SCHOOLS SERVICES BLOCK UPDATE 2023-24**

### **Purpose of the Report**

1. To update schools forum on issues relating to the Central Schools Services Block (CSSB) budget for 2023-24 financial year and the decisions that will need to be made as part of the budget setting process.
2. Schools Forum will recall the budget proposal was approved in principle at the December meeting and the only change since this is the actual charge for copyright licences has been received from the DfE.

### **Main Considerations**

3. As outlined in the funding settlement paper the DfE has allocated a CSSB allocation of £2.600 million for Wiltshire. This has been calculated using the national funding formula for the CSSB which applies a unit value of £36.75 to the pupil numbers from the October 2022 census. Funding for agreed historic commitments for 2023-24 is then added to the amount of funding generated by the formula to give the overall total CSSB.
4. Schools Forum will recall allocations were published earlier than usual in July 2022 and as a result a report was presented, and this budget was agreed in principle at the December 2022 meeting.

### **Protection and Funding Changes**

5. Schools Forum will remember that the DfE have been reducing historic commitments. Wiltshire has been allocated £0.235m for historic commitments based on those commitments agreed as eligible in 2022-23 reduced by 20% of £0.059m. The DfE apply a maximum per pupil reduction in funding for ongoing responsibilities of -2.5%. Permitted gains are capped at 5.86% for 2023-24.

### **Function of the CSSB**

6. The CSSB allocates funding to the LA to carry out central functions on behalf of pupils of maintained schools and academies. Funding includes:
  - funding previously allocated through the retained duties element of the Education Services Grant (ESG)
  - funding for ongoing central functions, such as admissions, previously top-sliced from the schools block
  - residual funding for historic commitments, previously top-sliced from the schools block
7. The duties included within the CSSB are listed in Appendix 1 to this report.
8. Additional pension funding that local authorities have claimed for centrally employed teachers are now rolled into the ongoing responsibilities element of the CSSB. This funding has been added as a per-pupil amount to the relevant local authority's per-pupil rate.

9. The decisions that schools forum is required to make in relation to the central schools block are listed below. These are in relation to the duties that local authorities have towards all schools.
10. Schools forum approval is required on a line by line basis for this group of services which are funded from central schools block. The tables show each line, the 2021-22 base and the proposed 2023-24 budget.

Approval required & legislative narrative	Services covered	2021-22 Budget £M	Wiltshire Budget Proposal 2023-24 £M
<b>Section A</b> <ul style="list-style-type: none"> <li>Schools forum approval is <b>not</b> required (although they should be consulted)</li> </ul>	<ul style="list-style-type: none"> <li>Central Copyright Licences for 2023-24 for Wiltshire as set by the DfE.</li> </ul>	£0.409m	£0.457m
<b>Section B</b> Schools forum approval is required on a <b>line-by-line</b> basis <ul style="list-style-type: none"> <li>back pay for equal pay claims</li> <li>remission of boarding fees at maintained schools and academies</li> <li>places in independent schools for non-SEN pupils</li> <li>admissions</li> <li>servicing of schools forum</li> <li>contribution to responsibilities that local authorities hold for all schools</li> <li>contribution to responsibilities that local authorities hold for maintained schools (voted on by relevant maintained school members of the forum only)</li> </ul>	The limitation on increases to centrally held spend has been removed from the budgets for admissions and servicing of schools forums. It is therefore proposed to apply salary inflation to the budget for the central teams and address the safeguarding and admission pressures. This is affordable within the overall CSSB allocation.  <b>Services previously funded by the retained rate of the ESG**:</b>		
<ul style="list-style-type: none"> <li>Education Welfare Service</li> </ul>		£0.203	£0.221
<ul style="list-style-type: none"> <li>Asset Management</li> </ul>		£0.189	£0.206
<ul style="list-style-type: none"> <li>Statutory / Regulatory Duties</li> </ul>		£0.682	£0.743
<ul style="list-style-type: none"> <li>Admissions</li> </ul>		£0.447	£0.474
<ul style="list-style-type: none"> <li>Servicing of Schools Forum</li> </ul>		£0.003	£0.003

*\*the actual amount for copyright licences is calculated by the DfE a 12% increase on 22-23 FY.*  
*\*\* Pay inflation has been added at 4.50% - this can be reviewed as national discussions continue.*

## Centrally Retained Teachers additional pension costs

Introduced in 2021-22 financial year	£0.127M
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### **Section C – Historic Commitments**

11. In 2017-18 the DfE provided supplementary guidance on the funding and reporting of historic commitments within central DSG. The guidance also detailed the evidence that Schools Forum required on each item in order to approve the spend:
- **Minutes from the schools forum prior to 1<sup>st</sup> April 2013** – schools forum should have agreed the commitment prior to 2013
  - **Proof that the commitment extended at least as far as the 2018-19 financial year.** Evidence can include reports which indicated an end date in to 2018-19 or beyond, or where the commitment has no specific end date.
  - **Where budgets relate to non-staffing costs, there must be a contractual commitment** (such as a PFI agreement or lease agreement) which extends into the relevant financial year.
  - **Schools forum papers and minutes that show that approval has been granted for the financial year.** The forum is expected to approve each spending line annually. It is important that schools forums have sufficient information to be able to make an informed decision.
12. Having considered the guidance and the available evidence, the commitments agreed by schools forum for 2018-19 and therefore funded within the CSSB allocation for 2023-24 are as per the table overleaf. The reduction has been taken from the contribution to CERA in order that vulnerable pupils funding is prioritised.
13. The overall total is within the £0.235m allocated for historic commitments.
14. Schools Forum should consider the DfE's intention to reduce the historic funding over time in this and future years' funding decisions.

Approval required & legislative narrative	Services covered	2022-23 Budget £M	Wiltshire Budget Proposal 2023-24 £M
<p><b>Section C</b></p> <p><b>Historic Commitments:</b></p> <p>Schools forum approval is required on a <b>line-by-line</b> basis. The budget cannot exceed the value agreed in the previous funding period and no new commitments can be entered into</p> <ul style="list-style-type: none"> <li>capital expenditure funded from revenue – projects must have been planned and decided on prior to April 2013 so no new projects can be charged</li> <li>contribution to combined budgets – this is where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources</li> <li>existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged)</li> <li>Prudential borrowing costs – the commitment must have been approved prior to April 2013</li> </ul>	<p><b>Funding for LAC Personal Education Plans</b> - Schools Forum decision December 2007 to support PEPs for Looked After Children from 2008/09 financial year as required under "Care Matters". Allocation based on original estimate of £500 per LAC and managed by Virtual Head Teacher. PPG Plus now also supports PEPs <i>and so this funding was reduced to £103,000 in 2018/19 – no change is requested by the Virtual School.</i></p>	0.103	0.103  <i>Meets definition And required evidence is available</i>
	<p><b>Child Protection in Schools Adviser</b> - Schools Forum decision January 2006 to support staff within Children's Services to provide support and advice to schools enabling them to meet their statutory responsibilities.</p>	0.056	0.056  <i>Meets definition And required evidence is available</i>
	<p><b>Prudential Borrowing</b> Schools forum decision to support approx. £3m capital financing for 13-year period</p>	0.133	0.076  <i>Meets definition And required evidence is available</i>
<b>Total</b>		<b>0.294</b>	<b>0.235</b>
Balance unallocated and available to transfer to the HNB		0.260	0.133

15. Local authorities can fund services previously funded from the general funding rate of the ESG (for maintained schools only) from maintained school budget shares, with the agreement of maintained school members of the schools forum.
16. The relevant maintained schools members of the schools forum (primary, secondary, special and pupil referral units (PRUs), should agree the amount the local authority will retain.
  - If the local authority and schools forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.
17. Local authorities should set a single rate per 5 to 16-year-old pupil for all mainstream maintained schools, both primary and secondary; in the interests of simplicity, this should be deducted from basic entitlement funding.
18. Many schools forums have agreed a top slice of schools funding to meet this shortfall. Wiltshire's schools have benefitted from taken the decision to treat the reduction in ESG funding as part of the general austerity reductions when setting the Council's medium-term financial plan. This has allowed the Council to fund business plan objectives and local priorities. The Council has deliberately selected to offer a level of protection for our school effectiveness services and have managed to avoid seeking approval from Schools Forum to date.
19. Assuming the proposed budget is accepted by schools forum, an amount of £0.133m unallocated CSSB is estimated to transfer to fund high needs pressures.

### **Proposals**

1. Schools Forum is asked to note the change to the copyright licence cost for 22-23 and reduction in the contribution to the high needs block in the report and the required decisions in relation to the central schools block budget for 2023-24. These will be considered fully in the decisions paper.
  - i. Section A – central copyright licences - consult only
  - ii. Section B – central functions - approve on a line-by-line basis
  - iii. Section C – historic commitments - approve on a line-by-line basis
  - Including the transfer of surplus CSSB grant to support the high needs block

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163.3. We have included references to the relevant schedules in the 2018 (No. 2) Regulations.

### Statutory and regulatory duties

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Director of children’s services and personal staff for director (Sch 2, 15a)</li> <li>• Planning for the education service as a whole (Sch 2, 15b)</li> <li>• Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)</li> <li>• Authorisation and monitoring of expenditure not met from schools’ budget shares (Sch 2, 15c)</li> <li>• Formulation and review of local authority schools funding formula (Sch 2, 15d)</li> <li>• Internal audit and other tasks related to the authority’s chief finance officer’s responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 2, 15e)</li> <li>• Consultation costs relating to non-staffing issues (Sch 2, 19)</li> <li>• Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f)</li> <li>• Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17)</li> <li>• Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)</li> </ul>	<ul style="list-style-type: none"> <li>• Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 2, 57)</li> <li>• Budgeting and accounting functions relating to maintained schools (Sch 2, 74)</li> <li>• Authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Sch 2, 58)</li> <li>• Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 2, 59)</li> <li>• Internal audit and other tasks related to the authority’s chief finance officer’s responsibilities under Section 151 of LGA 1972 for maintained schools (Sch 2, 60)</li> <li>• Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 61)</li> <li>• Investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Sch 2, 62)</li> <li>• Functions related to local government pensions and administration of teachers’ pensions in relation to staff working at maintained schools under the</li> </ul>

Responsibilities held for all schools	Responsibilities held for maintained schools only
	<p>direct management of the headteacher or governing body (Sch 2, 63)</p> <ul style="list-style-type: none"> <li>• Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 2, 76)</li> <li>• HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Sch 2, 64); determination of conditions of service for non-teaching staff (Sch 2, 65); appointment or dismissal of employee functions (Sch 2, 66)</li> <li>• Consultation costs relating to staffing (Sch 2, 67)</li> <li>• Compliance with duties under Health and Safety at Work Act (Sch 2, 68)</li> <li>• Provision of information to or at the request of the Crown relating to schools (Sch 2, 69)</li> <li>• School companies (Sch 2, 70)</li> <li>• Functions under the Equality Act 2010 (Sch 2, 71)</li> <li>• Establish and maintaining computer systems, including data storage (Sch 2, 72)</li> <li>• Appointment of governors and payment of governor expenses (Sch 2, 73)</li> </ul>

**Table 9a: Central services responsibilities held by local authorities (statutory and regulatory duties)**



## Education welfare

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 2, 20)</li> <li>• School attendance (Sch 2, 16)</li> <li>• Responsibilities regarding the employment of children (Sch 2, 18)</li> </ul>	<ul style="list-style-type: none"> <li>• Inspection of attendance registers (Sch 2, 79)</li> </ul>

**Table 9b: Central services responsibilities held by local authorities (education welfare)**

## Asset management

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)</li> <li>• General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b)</li> </ul>	<ul style="list-style-type: none"> <li>• General landlord duties for all maintained schools (Sch 2, 77a &amp; b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have:               <ul style="list-style-type: none"> <li>• appropriate facilities for pupils and staff (including medical and accommodation)</li> <li>• the ability to sustain appropriate loads</li> <li>• reasonable weather resistance</li> <li>• safe escape routes</li> <li>• appropriate acoustic levels</li> <li>• lighting, heating and ventilation which meets the required standards</li> <li>• adequate water supplies and drainage</li> <li>• playing fields of the appropriate standards</li> </ul> </li> <li>• General health and safety duty as an employer for employees and</li> </ul>

Responsibilities held for all schools	Responsibilities held for maintained schools only
	<p>others who may be affected (Health and Safety at Work etc. Act 1974)</p> <ul style="list-style-type: none"> <li>• Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012)</li> </ul>

Table 9c: Central services responsibilities held by local authorities (asset management)

### Central support services

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• No functions</li> </ul>	<ul style="list-style-type: none"> <li>• Clothing grants (Sch 2, 53)</li> <li>• Provision of tuition in music, or on other music-related activities (Sch 2, 54)</li> <li>• Visual, creative and performing arts (Sch 2, 55)</li> <li>• Outdoor education centres (but not centres mainly for the provision of organised games, swimming or athletics) (Sch 2, 56)</li> </ul>

Table 9d: Central services responsibilities held by local authorities (central support services)

### Premature retirement and redundancy

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• No functions</li> </ul>	<ul style="list-style-type: none"> <li>• Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 2, 78)</li> </ul>

Table 9e: Central services responsibilities held by local authorities (premature retirement and redundancy)

## Monitoring national curriculum assessment

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring of National Curriculum assessments (Sch 2, 75)</li> </ul>

Table 9f: Central services responsibilities held by local authorities (monitoring national curriculum assessment)

## Therapies

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>This is now covered in the high needs section of the regulations and does not require schools forum approval</li> </ul>

Table 9g: Central services responsibilities held by local authorities (therapies)

## Other ongoing duties

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>Licences negotiated centrally by the Secretary of State for all publicly funded schools (Sch 2, 8); this does not require schools forum approval</li> <li>Admissions (Sch 2, 9)</li> <li>Places in independent schools for non-SEN pupils (Sch 2, 10)</li> <li>Remission of boarding fees at maintained schools and academies (Sch 2, 11)</li> <li>Servicing of schools forums (Sch 2, 12)</li> <li>Back-pay for equal pay claims (Sch 2, 13)</li> <li>Writing to parents of year 9 pupils about schools with an atypical age of admission, such as UTCs and</li> </ul>	<ul style="list-style-type: none"> <li>No functions</li> </ul>

<b>Responsibilities held for all schools</b>	<b>Responsibilities held for maintained schools only</b>
studio schools, within a reasonable travelling distance <sup>10</sup> (Sch 2, 23)	

**Table 9h: Central services responsibilities held by local authorities (other ongoing duties)**

### Historic commitments

<b>Responsibilities held for all schools</b>	<b>Responsibilities held for maintained schools only</b>
<ul style="list-style-type: none"> <li>• Capital expenditure funded from revenue (Sch 2, 1)</li> <li>• Prudential borrowing costs (Sch 2, 2(a))</li> <li>• Termination of employment costs (Sch 2, 2(b))</li> <li>• Contribution to combined budgets (Sch 2, 2(c))</li> </ul>	<ul style="list-style-type: none"> <li>• No functions</li> </ul>

**Table 9i: Central services responsibilities held by local authorities (historic commitments)**

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<sup>10</sup>Funding for this duty was previously delivered to local authorities via a s.31 grant. Additional funding was added to the CSSB baseline for this from 2018 to 2019.

Wiltshire Council

School Funding & SEN Working Group  
9 January 2023

Schools Forum  
19 January 2023

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## Dedicated Schools Budget – Schools Block Update 2023-24 (Delegated Budget)

### Purpose of the Report

1. To update Schools Forum on issues relating to the schools delegated budget for 2023-24 and the decisions that will need to be made as part of the budget setting process.

### Main Considerations

2. As outlined in the funding settlement paper the Department for Education (DfE) has allocated a schools' block quantum to Wiltshire of £346.293 million. This includes funding of £1.964 million for the growth fund, based on the growth formula, detailed later in this report.
3. Cabinet approved the funding formula for 2022-23 proposed by Schools Forum which confirmed that Wiltshire would mirror the national funding formula (NFF). Formula factors were all fully funded at the published NFF values in 2022-23.
4. Modelling work has been prepared to calculate individual school budgets based on the DfE's NFF. The main funding formula for 2023-24 is broadly similar to the formula for 2022-23 but the following changes should be noted.
  - An increase in Pupil and School led funding values of 2.4% with Deprivation funding increased by 4.3%
  - Minimum Funding Guarantee set between 0.0% and 0.5% to ensure all schools see a gain in funding on their pupil led funding
  - Increases in the minimum per pupil funding levels (MPPFL) to £4,405 and £5,715 in primary and secondary schools
5. Modelling suggests that the NFF is fully affordable within the funding envelope provided by the DfE. The Schools Block of funding is sufficient to afford the full NFF with further discussion of some factors detailed in this report.

## The National Funding Formula

6. Since the introduction of the NFF, it has been Wiltshire's intention to move across to mirror and replicate the formula in the 'soft' years, prior to moving to the 'hard' formula. Over the last five years, Wiltshire has moved across to funding schools, subject to affordability, using the NFF factor values. Where the NFF values could not be afforded, the Free School Meal Ever6 (FSM6) factor was compromised to ensure the other factor values were affordable. For the last four years, the formula has been fully affordable.
7. The DfE published their NFF factor values in the Summer of 2022 and following the announcement about the size of the DSG, the funding formula has been modelled to incorporate the NFF values (see Appendix 1 for rates).
8. Based upon the Schools' Block allocation, the formula is fully affordable for the 2023-24 financial year, applying all the NFF factor values. Wiltshire has been funded through the NFF and this has ensured that Schools Forum is presented with a position of affording the full NFF.
9. Within the modelling, the following elements have been included, as agreed with Schools Forum in December 2022:
  - Full NFF values applied for all funding factors
  - MFG set at the maximum level of +0.5%
  - Transfer from Schools' Block to High Needs Block of 0.5% (£1.716m)
10. The table below sets out the funding position having applied all the NFF values and taken account of any proposed transfers, to demonstrate the affordability position.

<b>Funding 2023-24</b>	<b>Amount £</b>
Core funding	£344,328,861
Growth funding	£1,964,347
<b>Net Funding</b>	<b>£346,293,208</b>
Less: NNDR Business rates	(£2,992,217)
<b>TOTAL</b>	<b>£343,300,991</b>
Transfer to High Needs Block (0.5%)	(£1,716,505)
<b>Available for School Funding</b>	<b>£341,584,486</b>
NFF requirements	£341,051,836
Growth Fund	£532,650
<b>Schools Block Allocated</b>	<b>£341,584,486</b>

## Growth Funding Allocation 2023-24

11. Growth allocations for 2023-24 are based upon pupil data from the October 2022 census and the October 2021 census.
12. The county is separated into 62 Middle Layer Super Output Areas (MSOA) with an average of 4 schools in each MSOA area. Growth is measured by counting the increase in pupil numbers in each MSOA between the October 2021 and October 2022 censuses. Only positive increases in pupil numbers are included, so positive growth in one area, and negative growth in another, will not be denied growth funding.
13. The DfE do not expect local authorities to use these rates in their local arrangements for funding growth but instead the growth factor acts as a proxy for overall growth costs at local authority level.
14. At the Schools Forum meeting in December 2022, Schools, the criteria for allocating Growth funding in the 2023-24 year was confirmed. The amount of funding allocated to Wiltshire for the 2023-24 year is set out in the table below.

<b><u>Funding 2022-23</u></b>	<b><u>Primary</u></b>	<b><u>Secondary</u></b>	<b><u>TOTAL</u></b>
<b>Growth in Pupils</b>	198	725	923
<b>Rate</b>	£1,530.92	£2,291.34	
<b>Amount</b>	<b>£303,122</b>	<b>£1,661,224</b>	<b>£1,964,361</b>

### Historical Position

15. Growth funding forms part of the Schools Block of funding. Schools Forum has historically agreed an annual budget to be retained for funding pupil growth and has operated successfully within this funding envelope. In the financial year 2023-24 it is proposed to set the budget once again in line with the affordability, having applied NFF rates for the funding factors.

### Affordability

16. There are no plans to open any new schools in the 2023-24 year. The growth fund supports new primary and secondary schools with diseconomy costs for the first 7 years or until the school is full.
17. The Basic Need Class Expansion for additional classes is still to be confirmed with colleagues in the School places team for the 2023-24 academic year. However, growth is being experienced as new housing becomes available across the County, despite a falling birth rate being experienced.
18. The Infant Class Size increases are yet to be confirmed for 2022-23 but no more than four schools are expected to be funded through this factor.
19. The total Growth Fund requirement for 2023-24 is anticipated to come within the proposed budget, as allocated by the DfE and based upon the funding of all the NFF factors in full. Any surplus or deficit in the Growth Fund will form part of the overall DSG surplus or deficit balance.

## Minimum Funding Guarantee

20. The Minimum Funding Guarantee (MFG) was designed to prevent schools from experiencing significant reductions in their calculated 'per pupil' funding, year on year. Historically, the MFG had been set at -1.5% to prevent reductions in funding of greater than 1.5%.
21. Following the additional funding pledge, the DfE are seeking to ensure that all schools see an uplift in their calculated per pupil funding and have therefore proposed that the MFG is set at a positive figure of between 0.0% and 0.5%.
22. As in the 2022-23 year, modelling of the MFG is no longer a significant issue, as the majority of schools have moved off the MFG funding and as a result, no capping of schools would be required to fund the MFG again this year. This correlates with the DfE's intention to move all schools across towards the NFF, with an intention of introducing a 'hard' formula in due course.
23. Setting a positive MFG of 0.5% is fully affordable and will ensure that all schools see an uplift in their 'per pupil' funding of at least 0.5%. The cost to the formula in 2023-24 is £0.165m, subject to decisions taken by Schools Forum.

## Sparsity

24. The DfE's consultation in the 2021-22 year, introduced a number of changes to the criteria for the NFF sparsity factor. Schools Forum considered a report in 2021-22 which set out the implications of these changes for Wiltshire and agreed to mirror the NFF within the Wiltshire formula for 2022-23.
25. The criteria for Sparsity funding are based upon size and sparsity distance. The threshold is for primary schools of 150 pupils or less and secondary schools of 600 pupils or less. The distance threshold is now based upon the average road distance from the pupil's home to next nearest compatible school. Where this distance is greater than 2 miles for primary and 3 miles for secondary pupils a school is eligible for funding.
26. The NFF introduced a 'distance taper' which now means that primary and secondary schools with a sparsity distance within 20% of the threshold (1.6miles and 2.4miles for primary and secondary), will now be eligible for funding, using a tapering mechanism.
27. The formula also uses a tapering mechanism based upon size of the school such that schools receive a weighted proportion of the maximum value.
28. As part of the DfE's proposals to support small and rural schools, the maximum sparsity value for primary schools has now increased to £56,300, with Secondary schools increasing to £81,900. The table below shows the impact of these changes on the 2023-24 formula.

<b><u>2023-24</u></b>	<b><u>Primary</u></b>	<b><u>Secondary</u></b>	<b><u>TOTAL</u></b>
Eligible Schools	66	2	<b>68</b>
Funding	£2,402,634	£107,562	<b>£2,510,196*</b>
<b><u>2022-23</u></b>			
Eligible Schools	62	4	<b>66</b>
Funding	£2,236,040	£142,411	<b>£2,378,451*</b>
<b><u>2021-22</u></b>			
Eligible Schools	28	2	<b>30</b>
Funding	£295,939	£49,594	<b>£345,533</b>

\* – This represents 0.72% of the total Schools Block Allocation



## Minimum per Pupil Funding Levels (MPPFL)

29. The MPPFL's were introduced as part of the NFF and have been increased annually as part of the DfE's proposals to standardise funding across the country. These are mandatory as part of the NFF and therefore there is no scope for amending these values without permission from the Secretary of State.
30. The thresholds in primary and secondary schools for 2022-23 are £4,405 and £5,715 for primary and secondary respectively.
31. The overall funding allocated through the MPPFL is £2.497m in 2023-24, a decrease of £2.456m on the 2022-23 figure.
32. The amount allocated in 2022-23 was £4.953m a decrease of £1.623m on the 2021-22 figure of £6.576m.
33. As the NFF is embedded, the quantum of funding awarded through the MPPFL and the number of schools eligible to receive funding should continue to decrease.

	Schools Eligible		Funding to Schools		
Year	Primary	Secondary	Primary	Secondary	Total Funding
2021-22	75	14	£3,833,014	£2,743,228	<b>£6,576,242</b>
2022-23	61	11	£3,076,671	£1,874,834	<b>£4,951,505</b>
2023-24	32	4	£1,700,428	£796,828	<b>£2,497,255</b>

## Proposals

34. Schools Forum is asked to note the report.
35. Schools Forum to confirm its intention to apply all the funding factors at the 2023-24 NFF rates.
36. Schools Forum to note the stability and impact of the Sparsity factor.
37. Schools Forum to confirm setting the MFG at a level of 0.5%.
38. Schools Forum to confirm transferring 0.5% of the Schools Block to the High Needs Block, £1.716m, as the funding formula is affordable.
39. Schools Forum to agree the level of the Growth fund at £0.533m.

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Appendix 1

<b>Factor</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>
Primary KS1&2 AWPU	£2,747	£2,857	£3,123*	£3,217*	£3,394**
Secondary KS3 AWPU	£3,863	£4,018	£4,404*	£4,536*	£4,785**
Secondary KS4 AWPU	£4,386	£4,561	£4,963*	£5,112*	£5,393**
Primary & Secondary FSM	£440	£450	£460	£470	£480
Primary FSM6	£540	£560	£575	£590	£705**
Secondary FSM6	£785	£815	£840	£865	£1,030**
IDACI Primary Band A	£575	£600	£620	£640	£670
IDACI Primary Band B	£420	£435	£475	£490	£510
IDACI Primary Band C	£390	£405	£445	£460	£480
IDACI Primary Band D	£360	£375	£410	£420	£440
IDACI Primary Band E	£240	£250	£260	£270	£280
IDACI Primary Band F	£200	£210	£215	£220	£230
IDACI Secondary Band A	£810	£840	£865	£890	£930
IDACI Secondary Band B	£600	£625	£680	£700	£730
IDACI Secondary Band C	£560	£580	£630	£650	£680
IDACI Secondary Band D	£515	£535	£580	£595	£620
IDACI Secondary Band E	£390	£405	£415	£425	£445
IDACI Secondary Band F	£290	£300	£310	£320	£335
Prior Attainment – Primary	£1,022	£1,065	£1,095	£1,130	£1,155
Prior Attainment – Secondary	£1,550	£1,610	£1,660	£1,710	£1,750
EAL – Primary	£515	£535	£550	£565	£580
EAL - Secondary	£1,385	£1,440	£1,485	£1,530	£1,565
Mobility – Primary	£0	£875	£900	£925	£945
Mobility – Secondary	£0	£1,250	£1,290	£1,330	£1,360
Lump Sum	£110,000	£114,400	£117,800	£121,300	£128,000**
Sparsity – Primary	£0-£25,000	£0-£26,000	£0-£45,000	£0-£55,000	£0-£56,300
Sparsity – Secondary	£0-£65,000	£0-£67,500	£0-£70,000	£0-£80,000	£0-£81,900
Primary - MPPFL	£3,500	£3,750	£4,180	£4,265	£4,405
Secondary – MPPFL	£4,800	£5,000	£5,415	£5,525	£5,715

\* - Includes the Teachers Pay and Pension Grants of £180 for Primary and £265 for Secondary

\*\* - Incorporates the Schools Supplementary Grant funding for 2022-23 for AWPU, FSM6 and Lump Sum

## Wiltshire Council

School Funding & SEN Working Group  
9 January 2023

Schools Forum  
19 January 2023

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### Mainstream Schools Additional Grant (MASG) 2023-24 - Funding & Methodology

#### Purpose of the Paper

1. At the December 2022 Schools Forum meeting, members were advised that additional funding was being made available to schools for the 2023-24 year, however there was limited detail at that point.
2. This paper serves to update Schools Forum and outline the level of additional funding and how it will be allocated to schools in the 2023-24 year.

#### Introduction to Mainstream Schools Additional Grant 2023-24

3. In the Autumn of 2022, the Governments spending review (Autumn Statement) confirmed an additional £2.0bn of funding for schools and high needs, in addition to the previous funding pledges. Of the additional funding, £1.6bn has been allocated to mainstream schools in support of the general costs of living increases, pay awards and the wider cost pressures in schools. The remaining £400m has been allocated to the High Needs Block, of which Wiltshire's share is £2.94m.
4. Due to the timing of the funding announcement, it was not possible for the additional funding to be built into the core National Funding Formula (NFF) values and therefore the funding is being paid as an additional Grant in 2023-24. The **Mainstream Schools Additional Grant (MASG)** will be introduced from 1 April 2023, the start of the new financial year and will apply to maintained and academy schools alike. It is proposed that from 2024-25 that the additional funding will be baselined and incorporated into the NFF values and therefore the MASG grant will only be paid separately for the 2023-24 year.
5. As the funding cycle for academies follows the academic year and not the LA financial year, academy schools will receive additional grant funding for the period April – August 2024. This provides an equitable solution rolling the funding into academies core funding from September 2024, ensuring parity over funding between maintained schools and academies.

#### School Funding Rates

6. The funding is provided to assist schools with pay awards and wider cost pressures. Funding rates have been differentiated between Primary and Secondary pupils and

are approximately 22% higher than the Supplementary Grant rates in 2022-23. Funding does not extend to Early Years or Post-16 pupils.

7. Funding will be allocated using the following three elements, which are already key components of the NFF, using data from the October 2022 census.
  - A basic 'per pupil' rate based upon the 'key stages'
  - A lump sum paid to all schools (irrespective of size) - £4,510
  - A per pupil rate for FSM6 pupils (different rates for primary and secondary)
8. The table below sets out the funding rates for each element.

	<u>Primary</u>	<u>Key Stage 3</u>	<u>Key Stage 4</u>	<u>All Schools</u>
Basic per pupil rate	£119	£168	£190	
FSM6 per pupil rate	£104	£152	£152	
Lump sum per school				£4,510

9. The table below sets out some indicative funding for Wiltshire schools.

<u>School</u>	<u>Per Pupil</u>	<u>FSM6</u>	<u>Lump</u>	<u>TOTAL</u>
Small Primary (47)	£5,593	£520	£4,510	£10,623
½xFE Primary (104)	£12,376	£1,144	£4,510	£18,030
1xFE Primary (209)	£24,871	£3,744	£4,510	£33,125
2xFE Primary (420)	£49,980	£6,656	£4,510	£61,146
Small Secondary (440)	£77,066	£13,680	£4,510	£95,256
Medium Secondary (784)	£138,070	£28,728	£4,510	£171,308
Large Secondary (1,244)	£219,750	£25,688	£4,510	£249,948

## Proposal

10. Schools Forum is asked to note the report.

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Wiltshire Council

Schools Forum Finance & SEN Working Group  
9 January 2023

Schools Forum  
19 January 2023

## DEDICATED SCHOOLS BUDGET – HIGH NEEDS BLOCK UPDATE 2023-24

### Purpose of the Report

1. To update schools forum on issues related to the high needs block for 2023-24 and the decisions that will need to be made as part of the budget setting process for 2023-24.
2. Schools Forum will recall the budget approach was approved in principle at the December meeting. Since this meeting, final allocations including the “additional funding” have been published. Proposals for the expenditure plan are in this report.

### Main Considerations

3. As outlined in the paper on the funding settlement for 2023-24 the high needs block provisional allocation for Wiltshire in 2023-24 is £70.918 million. The high needs block has been calculated according to the new national funding formula for high needs. As previously reported to schools forum, Wiltshire is on the funding floor for the high needs NFF and therefore has received the minimum increase. In addition to the allocation, and as with schools block, a later “additional high needs” allocation of £2.942 million has been added – this is to fund the cost burden of energy, teachers and support staff pay and other cost pressures.
4. The table below shows the allocation and increase on 22-23:

	<b>High Needs</b>
2023-24*	£70,917,828
2022-23	£62,690,534
Uplift	£8,227,294
% Uplift	13.1%
<i>*Includes Supplementary Allocation for 2023-24</i>	<i>£2,941,915</i>

5. It has been nationally recognised that the level of funding for the most vulnerable pupils has been historically insufficient and included in the total allocation above is an increase of 8% of high needs block. Whilst this increase is most welcome, it does not fully address the magnitude of the cumulative pressures from previous financial years, nor does it fully address the anticipated pressure for 2023-24 financial year for Wiltshire. Following the DfE consultation – the SEN review - published in summer 2022, no significant funding formula updates were proposed.
6. In terms of decision making for the high needs block the guidance on schools forum powers and responsibilities states that all central spend on high needs block provision is decided by the local authority. This would include decisions on top up values. Because of this and the interdependencies of decisions across all the funding blocks, final decisions on high needs will be presented alongside those that schools forum is required to make on all of the other blocks.

### ***Projected Demand on High Needs Block***

7. Appendix 1a provides an early assessment of pressure on the high needs block for 2023-24. The bases for the initial estimate include the following
  - a. Non teaching staff pay increases above budget for 22-23
  - b. 4.5% non teaching staff pay increase estimate for 23-24
  - c. An estimate of September 2023 special school, ELP and resource base planned places
  - d. Demand based on 2022-23 latest forecasts
  - e. Contractual inflation on externally commissioned services
8. It has been the preference of Schools Forum in previous years to prioritise and protect rates of named pupil allowance and top up funding to ensure inclusivity is possible. The budget proposal assumes this is still the approach and therefore transfer is proposed as below.
9. It is not possible to fully fund the pressures above from within the high needs block. In order to partially fund the pressures on the high needs block, the following model could be implemented which includes a transfer from other blocks. Appendix 2 shows the proposed HNB budget (*which is to follow*).
10. In balancing the budget, it is recommended that;
  - a. There is a transfer from the Central Block to High Needs Block – as previous years, any unallocated CSSB is transferred to contribute to the high needs pressures.
  - b. Taking into account the wishes of schools who responded to the Autumn consultation, that there is a transfer of Schools Funding to High Needs Block of 0.5% - approximately £1.643 million to be transferred from Schools Block. This will be dependent on the decisions made by the forum around the schools formula and affordability of the transfer.
  - c. It is possible that the DfE estimated growth fund surplus to estimated growth fund requirements for 2023-24. Any underspent growth fund will contribute to the overall DSG deficit position next year.
  - d. The recovery actions of the High Needs Block working group continue and schools forum monitor these in conjunction with ongoing discussions with the DfE.

### **Additional High Needs (previously Supplementary) Funding**

11. The DfE have allocated an amount of £400 million nationally for schools and high needs following the publication of the DSG 2023-24 allocations. £2.942 million has been allocated to Wiltshire.
12. These allocations are on top of the DSG high needs block allocations calculated under the national funding formula but are subject to the same DSG conditions of grant.
13. It is proposed that this grant is held slightly separately to the high needs annual allocation and rather than continuing to reduce the funding gap, these funds are invested in early help and prevention, building capacity to increase inclusion, and facilitate long term closure the gap. Appendix 1b includes an initial estimate which includes
  - a. Ensuring the MFG for special schools is funded and
  - b. Applying a 4.5% increase to the secondary schools alternative provision (AP) service level agreement

14. The 2023-24 guidance includes a minimum funding guarantee for special schools. The minimum funding guarantee (MFG) protection for maintained special schools and special academies in 2023 to 2024 is set by a condition of grant that applies to local authorities' DSG. A 3% MFG has been set for special schools in 2023 to 2024. Recognising that some local authorities have already passed on additional funding for pressures in 2022 to 2023, instead of making a year-on-year calculation, the comparison will be with schools' 2021 to 2022 funding baselines.
15. This means those special schools already receiving an appropriate increase in 2022 to 2023 may not require a further increase to reach the MFG level. In order to ensure each of our Wiltshire Special Schools is funded above the minimum of 3%, a 0.25% increase to top up rates is budgeted. This calculation is shown at Appendix 3.

### **DSG Deficit Reserve & Management Plan**

16. The current forecast overspend on the School Funding reserve is £34.734m. This is currently being cash flowed by the local authority. There has been significant lobbying by schools, local authorities and Councillors. The DfE response has been the introduction of a programme of intervention work.
17. Councils nationally have an estimated £2.3 billion in high needs funding deficits. Those authorities with the most significant deficits, have been enrolled in the DfE "Safety Valve" programmes. Following the publication of the SEN Review the DfE have published a suite of reports and guidance to support local authority budget management and recovery plans. Wiltshire has been offered support in the third phase of the DfE's "Developing Better Value" (DBV) programme. The Council is scheduled to be part of the DfE's third phase of the DBV programme starting in June 2023. The DfE have appointed Newton, CIPFA and SEN advisers to work with officers to review the recovery plan and provide support and guidance.
18. In addition to this, Council transformational funding of £1.6m has been earmarked to support a significant programme of change which will align with the DBV programme to facilitate financial recovery for Wiltshire.
19. The plan has been updated to show the November 2023-23 forecast expenditure and budget allocations and is attached at Appendix 4 (*which is to follow*) however, more work on the impact of the proposed early help and prevention investment from the additional funding will be added following budget finalisation.

### **Proposals**

20. Schools Forum is asked to note the pressures on the high needs block for 2023-24 and the potential options to reduce the shortfall against high needs budgets including agreeing a transfer from Schools Block to balance the high needs pressures. This will form part of the decision-making matrix – our final report at today's meeting.
21. Schools Forum is asked to note the investment from the local authority's transformation reserve of £1.6m. This will pre-date and align with DBV funding from the DfE.
22. Schools Forum is asked to provide views on the approach to deploy the additional HNB funding in 2023-24, funding the Special schools minimum funding guarantee and invest in early help, prevention and long term recovery.

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## Appendix 1a - High Needs Block Budget Estimate 2023-24

### High Needs Block Budget Approach & Estimate for 2023-24

£m

#### Step 1 - Assess accumulated pressure 22-23

Current HNB Budget 22-23	66.531
22-23 Pay Inflation above budget	0.327
22-23 forecast demand pressure	12.408
	<u>£79.266</u>

#### Step 2 - Estimate future inflationary, demand and place planning pressures

23-24 Pay estimate 4.5%	0.335
23-24 estimated specialist places demand	1.009
23-24 estimated demand pressure (8% to 12%) on selected services - NPA, top up & ISS+	4.915
23-24 contractual inflation	0.498
	<u>£86.023</u>

#### Step 3 - Establish available Funding

DfE Allocation 23-24	67.976
Transfers in - Schools Block	1.717
Transfers in - Central School Services Block	0.133
	<u>£69.825</u>

#### Step 3 - Apply mitigations to produce a balanced budget

Protect at Required Level: Specialist Places, service teams, contractual obligations, secondary AP SLA	26.680
Pro rate downwards - demand driven budgets	43.145
	<u>£69.825</u>

## Appendix 1b - Additional High Needs Block Budget Estimate 2023-24

### Additional High Needs Block Budget Approach & Estimate 2023-24

£m

Developing Systems	0.500
Supporting Ordinarily Available Provision (OPAL)	0.500
Emotionally Based School Avoidance (EBSA)	1.000
SENCO Training & Network	0.200
Increase Speech & Language Support - prevention agenda	0.200
Develop capacity & leadership in Inclusion (prevention, alternative routes)	0.300
Inflation on AP SLA @ 4.5% teaching & non teaching staff	0.136
Minimum Funding Guarantee Special Schools	0.025
Contingency (to balance)	0.080
	<u>£2.942</u>

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**Appendix 3 - Special Schools Minimum Funding Guarantee 23-24 Rates**

This working paper follows the DfE Model guidance and shows the increase between 2021-22 actual costs and the 2022-23 forecast costs which indicates whether additional % increases need to be applied to Special school Top up rates for 2023-24 in order to meet the Special Schools Minimum Funding Guarantee of 3% across 21-22 to 23-24 financial years.

Table 1: MFG calculation – a worked modelling baseline summary

		Special schools funding: 2021 to 2022 pupil	22-23 funded rates at 21-22 pupil numbers	Target 3% - increase top ups by 0.25% across the board	Special School Funding Bands						
		Total	Total		L1	U1	L2	U2	L3	L4	
Silverwood	Number of places	360	360								
	Number of pupils	386	386								
	Place funding @ £10,000 per pupil	£3,600,000	£3,600,000								
	Top-up funding	£3,400,280	£3,604,253		21-22 Top Up Rates	£2,360	£4,800	£6,570	£8,820	£12,950	£19,000
	Total funding	£7,000,280	£7,204,253		22-23 Top Up Rates	£2,502	£5,088	£6,964	£9,349	£13,727	£20,140
					23-24 Top Up Rates	£2,565	£5,215	£7,138	£9,583	£14,070	£20,644
	MFG % difference from 2021 to 2022		2.91%	3.04%							
Downland	Number of places	89	89								
	Number of pupils	86	86								
	Place funding	£890,000	£890,000		21-22 Top Up Rates	£2,336	£4,672	£6,396	£8,528	£12,432	£18,157
	Top-up funding	£991,760	£1,051,271		22-23 Top Up Rates	£2,476	£4,952	£6,780	£9,040	£13,178	£19,246
	Total funding	£1,881,760	£1,941,271		23-24 Top Up Rates	£2,538	£5,076	£6,950	£9,266	£13,507	£19,727
			3.16%	3.30%							
	MFG % difference from 2021 to 2022										
Exeter House	Number of places	152	152								
	Number of pupils	152	152								
	Place funding	£1,520,000	£1,520,000		21-22 Top Up Rates	£2,301	£4,603	£6,302	£8,403	£12,249	£17,890
	Top-up funding	£1,731,491	£1,938,027		22-23 Top Up Rates	£2,502	£5,088	£6,964	£9,349	£13,727	£20,140
	Total funding	£3,251,491	£3,458,027		23-24 Top Up Rates	£2,565	£5,215	£7,138	£9,583	£14,070	£20,644
			6.35%	6.50%							
	MFG % difference from 2021 to 2022										
Springfield	Number of places	204	204								
	Number of pupils	201	201								
	Place funding	£2,040,000	£2,040,000		21-22 Top Up Rates	£2,400	£4,800	£6,850	£9,100	£12,850	£18,650
	Top-up funding	£2,027,500	£2,149,150		22-23 Top Up Rates	£2,544	£5,088	£7,261	£9,646	£13,621	£19,769
	Total funding	£4,067,500	£4,189,150		23-24 Top Up Rates	£2,608	£5,215	£7,443	£9,887	£13,962	£20,263
			2.99%	3.12%							
	MFG % difference from 2021 to 2022										

Page 75

**Notes**

A parity funding review was carried out in 2022-23 and top up rates for Exeter House were aligned to those of Silverwood - this re-basing influences the % change above. In future years this will plateau.

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