

# AGENDA

**Meeting:** Schools Forum  
**Place:** Via Microsoft Teams  
**Date:** Thursday 17 October 2024  
**Time:** 1.30 pm

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<b>Membership:</b>	<b>Representing:</b>
Aileen Bates	WGA - Special School Governor Representative
Lyssy Bolton	Early Years Representative
TBC	Observer - Children and Families Voluntary Sector Forum
Helen Carpenter	Chair of WASSH - Secondary Academy Representative
Stella Fowler	WGA - Primary School Governor Representative
Jo Grenfell	Observer - Post 16, Wiltshire College
John Hawkins	Teaching Association Representative
Toni Hayzen	PHF - Primary Academy Representative
Cllr Ross Henning	Observer - Local Youth Network
Brett Jony	WASSH - Secondary Academy Representative
Georgina Keily-Theobald	WASSH - Maintained Special School Representative
Emily Mullord	PHF - Primary Academy Representative
Nick Norgrove	WASSH - Maintained Secondary School Representative
Lisa Percy	WASSH - Secondary Academy Representative
Edward Powe	PHF - Maintained Primary Representative
Giles Pugh	Salisbury Diocesan Board of Education Representative
John Read	PHF - Maintained Primary Representative
Graham Shore	PHF - Primary Academy Representative
Adam Smith	PHF - Maintained Primary Representative
Trudy Srawley	Observer - Wiltshire Parent Carer Council
Ros Sutton	WGA - Primary School Governor Representative
Karen Venner	Early Years Representative
David Whewell	WGA - Secondary School Governor Representative
Nicola Whitcombe	WASSH - Special School Academy Representative

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Please see the agenda list on following pages for details of deadlines for submission of questions and statements for this meeting.

For extended details on meeting procedure, submission and scope of questions and other matters, please consult [Part 4 of the council's constitution](#).

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## **PART I**

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

1 **Election of Chair for 2024-25**

To elect a Chair of Schools Forum for 2024-25.

2 **Election of Vice Chair for 2024-25**

To elect a Vice Chair of Schools Forum for 2024-25.

3 **Apologies, Substitutions and Changes of Membership**

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

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

To approve as a correct record and sign the minutes of the meeting held on 27 June 2024 (copy attached).

5 **Chair's Announcements**

To receive any announcements from the Chair.

6 **Declaration of Interests**

To note any declarations of interests.

7 **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 15 October 2024**. 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 10 October 2024** 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.

8 **Updates from Working Groups** (*Pages 17 - 24*)

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

- Joint meeting of the School Funding Working Group and SEN Working Group – 23 September 2024
- Early Years Reference Group – 27 September 2024

9 **Wiltshire Schools Forum Proportionality, Membership and Terms of Reference** (*Pages 25 - 36*)

The report of Lisa Pullin (Democratic Services Officer/Clerk to Schools Forum) seeks to inform that a review of proportionality, Schools Forum membership and its terms of reference have been carried out and that no changes are proposed.

10 **Schools Revenue Surplus and Deficit Balances 2023-24** (*Pages 37 - 50*)

The report of Grant Davis (Schools Strategic Financial Support Manager) presents the position of the revenue balances for Wiltshire maintained schools as at 31 March 2024 and identifies those in surplus and deficit.

11 **Dedicated Schools Budget - Budget Monitoring 2024-25** (*Pages 51 - 56*)

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 2024-25 as at Quarter 1 2024/25 (June 2024).

12 **Core Schools Budget Grant** (*Pages 57 - 60*)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to brief Schools Forum on the recently announced Core Schools Budget Grant (CSBG).

13 **Update on FACT Partnership Transformation Programme**

Simon Thomas (FACT Programme Lead) will present an update on the FACT Partnership Transformation Programme at the meeting.

14 **SEND Transformation Update** (*Pages 61 - 94*)

The report of Liz Williams (Finance Lead – High Needs Sustainability) seeks to update Schools Forum on the SEND Transformation Programme.

15 **Review of EHCP Top-Up Funding**

The report of Liz Williams (Finance Lead – High Needs Sustainability Programme) seeks to update Schools Forum on progress on the review of EHCP top-up funding and seek views on the proposed direction of travel prior to a formal consultation with schools commencing in early November. The report is *to follow*.

16 **Confirmation of Dates for Future Meetings**

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

12 December 2024  
23 January 2025  
13 March 2025  
12 June 2025  
9 October 2025  
11 December 2025.

17 **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 27 JUNE 2024 AT ONLINE MEETING - VIA MICROSOFT TEAMS.**

#### **Present:**

Nikki Barnett, Aileen Bates, Lyssy Bolton, Andy Bridewell, Helen Carpenter, Rebecca Carson, Michele Chilcott, Stella Fowler, John Hawkins, Georgina Keily-Theobald, Graham Nagel-Smith, Nick Norgrove, Lisa Percy (Chair), John Read, Graham Shore (Vice-Chair), Trudy Srawley, Karen Venner, Nicola Whitcombe, David Whewell, and Catriona Williamson.

#### **Also Present:**

Tony Hayzen (Observer), Julia Honeywell (Observer), Cllr Nabil Najjar, Ed Powe (Observer), and Cllr Suzanne Wickham

Grant Davis (Schools Strategic Financial Support Manager), Kathryn Davis (Director - Education and Skills), Lisa Fryer (Head of SEND and Inclusion), Ellen Ghey (Democratic Services Officer), Kai Muxlow (Interim Head of Families and Children Commissioning), Lisa Pullin (Democratic Services Officer), Ben Stevens (Sustainability Strategic Lead – High Needs Block), Marie Taylor (Head of Finance - Children & Education) and Liz Williams (Finance Lead – High Needs Block Sustainability)

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### **16 Apologies, Substitutions and any Changes of Membership**

Apologies for absence from Members were received from:

- Cllr Ross Henning
- Giles Pugh

Further apologies were noted from:

- Amanda Butler (Head of School Effectiveness)
- Cllr Jane Davies (Cabinet Member for Adult Social Care, SEND, Transition, and Inclusion)
- Adam Smith (Primary Heads Forum)

The Chair announced the following Membership changes:

- Nicola Whitcombe was welcomed to the Schools Forum as the Headteacher of Springfield Academy as Special School Academy representative, taking over from Mike Thomas.
- Andy Bridewell, Catriona Williamson, Michele Chilcott, Rebecca Carson, and Graham Nagel-Smith were thanked for their hard work and commitment during their time as a part of the Schools Forum.

It was further noted that Toni Hayzen (Pembroke Park Primary School), Ed Powe (Staverton Primary School), and Julia Honeywell (Director of Children's Service – YMCA) were all in attendance as observers.

17 **Minutes of the Previous Meeting**

The minutes of the previous meeting held on 18 January 2024 were presented for consideration.

Following which, it was:

**Resolved:**

**The Schools Forum approved and signed the minutes of the previous meeting held on 18 January 2024 as a true and correct record.**

18 **Chair's Announcements**

The Chair made no announcements.

19 **Declaration of Interests**

There were no declarations of interest.

20 **Public Participation**

There were no questions or statements submitted in advance of the meeting.

21 **Updates from Working Groups**

The Chair raised the updates from the last meetings of the Early Years Reference Group held on 22 March and 7 June 2024, and the previous joint meeting of the School Funding Working Group and SEN Working Group held on 17 June 2024.

There being no questions or comments on the updates, it was then:

**Resolved:**

**The Schools Forum noted the updates from the last meetings of the Early Years Reference Group held on 22 March and 7 June 2024, and the previous joint meeting of the School Funding Working Group and SEN Working Group held on 17 June 2024.**

22 **Dedicated Schools Budget - Budget Monitoring 2023-24**

Marie Taylor, Head of Finance – Children & Education, introduced the report which presented the budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2023-24 as at 31 March 2024. The following was then highlighted:



- All the figures presented in the report were provisional, with the report due to be submitted to the July 2024 meeting of Cabinet for approval.
- The figures as noted in Paragraphs 4 to 7 of the report were detailed alongside Appendices 1 to 3.
- The budgets for the Early Years, Schools, High Needs, and Central School Services Blocks respectively were then detailed as per the relevant sections of the report.
- Finally, officers highlighted Paragraphs 21 to 22 of the report which detailed the deficit position and the first payment from the Department for Education (DfE) in relation to the Council's Safety Valve Agreement.

There being no questions or comments, it was then:

**Resolved:**

**The Schools Forum note the provisional outturn budget monitoring position including the balance on the DSG reserve at the end of March 2024, together with the reports later in the Agenda on the SEND Transformation Programme.**

23 **SEND Transformation Update**

Liz Williams, Finance Lead – High Needs Block Sustainability, presented the report which updated Members on the SEND Transformation Programme. The following was then highlighted:

- The different facets of the Programme were noted as per Paragraph 3 of the report, with officers emphasising that the report focussed on the High Needs Sustainability Plan and Safety Valve Agreement.
- It was noted that since the last meeting of the Schools Forum, the Safety Valve Agreement had been signed and the Programme Team had begun to implement the different workstreams with Appendix 1 detailing the summary table from the Council's Dedicated Schools Grant (DSG) Management Plan which supported the Safety Valve Plan.
- The onset of the delivery of the plan, including recruitment to the Programme Team, was detailed as per Paragraph 15 of the report.
- The two programme areas that were RAG rated Amber were highlighted, with officers explaining the reasons behind the rating as per Paragraph 20 of the report.
- Finally, officers highlighted the table under Paragraph 24 of the report which informed Members of the different changes that schools would start

to see as a result of the Programme, in domains such as finances, policy and governance, and training and professional development.

The Chair thanked officers for the presentation and commended the amount of hard work being undertaken between meetings.

Following which, it was:

**Resolved:**

**The Schools Forum note the update on the High Needs Sustainability Plan and the proposed changes to be implemented for the new school year.**

24 **Annual Schools Consultation - Transfer of funding from Schools Block to High Needs Block 2025-26**

Liz Williams, Finance Lead – High Needs Block Sustainability, presented the report which briefed Members on the consultation questions, and supporting information, to be sent out to all schools in the autumn of 2024 on the principles and value of any block transfer from the Schools Block to the High Needs Block in the 2025-26 financial year. The following was then highlighted:

- The background to the report as per Paragraphs 2 to 3 were detailed, and Members were reminded that in previous years, the Schools Forum had applied a principle to any block transfer decisions that the value of the transfer should not impact on the agreed National Funding Formula (NFF) values for schools. With the High Needs Sustainability Plan including an assumption that a transfer of 1% would be made from the Schools Block to the High Needs Block for the next 4 financial years starting from 2025-26, it was recognised that it must be the subject of an annual consultation with schools and the Schools Forum, and an annual disapplication request to the Secretary of State.
- It was noted that a transfer of 1% would impact on NFF levels allocated to schools, therefore the consultation for 2025-26 would need to model the potential impacts.
- Paragraph 10 of the report was highlighted, with officers seeking the views of Members in respect of the proposed consultation questions for schools as per Appendix 1.

In response to Member questions, officers clarified that adjustments could be applied in a number of ways, but after discussions with the Schools Funding Working Group, it was agreed that the most appropriate way would be to apply the reduction to pupil values. However, further information was needed before realistic estimates and the impacts on schools could be assessed.

Furthermore, it was explained that if there was no support for the transfer after the consultation, the financial impact would be the difference between 0.5% and 1% which would equate to approximately £1.6 to £1.8m. Although this was

acknowledged as a relatively small amount in the context of the whole High Needs Block, it was emphasised that as much investment as possible was needed in order to deliver the Safety Valve Plan as written, and Members were reassured that the Plan included a core workstream focussing on support for Mainstream Schools. It was further noted that a 1% transfer was consistent with other Local Authorities who were also involved in the Safety Valve Programme.

Members emphasised the importance of ensuring a sustainable system for SEND in terms of resource bases and alternative provisions and suggested that officers submitted a case study to a future meeting with the impacts on schools in other Local Authorities who made a 1% transfer to the High Needs Block from the Schools Block. It was further noted that if the transfer wasn't agreed it could jeopardise the release of funding from the Department for Education (DfE), therefore it was important that a satisfactory resolution was found.

At the conclusion of the discussion, it was:

**Resolved:**

**The Schools Forum confirmed the consultation questions and supporting information for all schools around a block transfer from the Schools Block to the High Needs Block in the 2025-26 financial year.**

25 **Allocation of Funding Growth in Specialist Places**

Liz Williams, Finance Lead – High Needs Block Sustainability, presented the report which sought agreement on the methodology for allocating funding for the growth in places in Wiltshire specialist provision from the High Needs Block. The following was then highlighted:

- The background to the report as per Paragraphs 2 to 4 of the report was noted and it was highlighted that the principles of any growth funding mechanism should be that funding is proportionate, predictable, and applied on a formulaic basis in line with agreed criteria.
- Paragraph 8 of the report detailed the 3 proposed criteria for funding pupil growth for the expansion and development of new special school places, with the table under Paragraph 10 displaying the significant growth within Special Schools in Wiltshire.

Members emphasised the importance of forward planning on the expansion of planned places rather than actual place in order to understand future and long term benefits over short term diseconomies of scale and to ensure viability as pupils moved into resource base settings. Members commended officers on the approach set out in the report and thanked officers for their hard work.

Following which, it was:

**Resolved:**

## **The Schools Forum:**

- 1. Approved the principle that advanced funding should be allocated to support expansion of specialist places.**
- 2. Approved the criteria for allocating growth funding for the planned increase in special school places.**
- 3. Agreed the principle of applying a similar approach for the development of new resource base places and agreed that proposed criteria should be drawn up.**

## 26 **Review of EHCP Top-Up Funding - Key Principles**

Liz Williams, Finance Lead – High Needs Block Sustainability, presented the report which outlined the principles to be applied to the review of top-up funding that schools receive for pupils with Education Health and Care Plans (EHCPs), and sought the views of Members on those principles. The following was then highlighted:

- Paragraphs 4 and 5 of the report explained Wiltshire's banded funding system for top-up funding. It was recognised that this was a significant issue to consider in terms of predictability, transparency, and stability of funding and to ensure that there was system that enabled schools to meet need sustainably.
- The key principles were detailed in Paragraph 9 of the report and officers noted other stakeholders such as parents, carers, and schools would be consulted before finalising the approach.
- Paragraph 10 of the report detailed the next steps and suggested timeline in order to deliver a review of top-up funding in line with the principles in Paragraph 9. Officers acknowledged that although it was an ambitious plan, it was important to undertake.

Officers explained that previous discussions on national bandings were ongoing, with the Department for Education (DfE) expected to make progress by the end of 2025. However, officers noted that they felt a quicker timescale was needed to ensure that plans could be delivered as a priority. Furthermore, it was expected that there would be a transitional implemented for national banding as all Local Authorities had their own funding banding systems at present, therefore officers wanted to be ahead of the curve.

In response to queries, officers explained that Early Years settings had been excluded from top-up rates as most were funded from the Early Years Inclusion Support Fund, not the High Needs Block. However, Members were reassured that there was a workstream focussing on Early Years, but it would run alongside this review rather than being incorporated within it. Despite this, the importance of Early Years settings was acknowledged and officers assured

Members that they were looking to undertake a review focussed on Early Years and to invest additional support at a future point.

Members noted that it would be helpful to have a strategic look at the overall income and expenditure for SEND provision on a child-by-child basis rather than overall provision but acknowledged that it would be a labour-intensive task. Furthermore, Members noted that creating networks and building an outreach model between Early Years specialists and professionals was vital in supporting Early Years settings and could allow for early interventions and therefore, a potential reduction in future EHCPs.

Members emphasised the importance of the review of top-up and growth funding for Special Schools as it enabled a higher level of security for finances and allowed staff to work on meeting needs rather than managing budgets, and thanked officers for their work.

Following which, it was:

**Resolved:**

**That Schools Forum confirm their agreement with the key principles, with a further paper to be brought to the October 2024 Schools Forum meeting detailing proposals for consultation.**

27 **Annual Schools Consultation**

Grant Davis, Schools Strategic Financial Support Manager, presented the report which sought to agree a set of questions to be sent out to all schools in the Autumn of 2024. The following was then highlighted:

- De-delegation of Central Expenditure was explained as per Paragraphs 3 to 4 of the report before detailing the budgets/services being consulted on as per Paragraph 5 of the report.
- The different scenarios that could flow from the proposals to delegate the budgets were then outlined for Members as per Paragraphs 6 to 8 of the report, with the proposed consultation questions listed in Appendix 1.
- The removal of the Local Authority Monitoring and Brokering Grant (LAMB) was then reiterated for Members as per the details in Paragraphs 11 to 12 of the report.

The Chair encouraged Members to liaise with colleagues to complete and return the consultation in order to make better informed decisions on behalf of the schools in the County.

Officers confirmed that the responses from the consultation would be separated between Primary and Secondary Schools responses for easier comparisons and data retrieval.

Following which, it was:

**Resolved:**

**That Schools Forum decide on the consultation questions for Maintained Schools around delegation/de-delegation of budgets for Central Services and School Improvement within the Schools' Block.**

28 **Early Years and Wraparound Childcare Update**

Kai Muxlow, Interim Head of Families and Children Commissioning, presented the report which briefed Members on the new legislation around Early Years and wraparound childcare. The following was then highlighted:

- The background to the Early Years entitlement expansion was explained as per Paragraphs 3 to 4 of the report before officers detailed more Wiltshire specific figures as per Paragraphs 5 to 8.
- It was highlighted that there continued to be a national issue with regard to recruitment and retention within the profession, therefore there was a focus on further recruitment campaigns, including the "Do Something Big" campaign by the Department for Education (DfE).
- The Central Government's ambition in respect of wraparound childcare was detailed as per Paragraphs 11 and 14 of the report alongside the DfE allocated capital funding and programme funding figures stated in Paragraphs 17 to 21 of the report.
- It was highlighted that all provision should be running and sustainable by September 2026, and that there should robust governance through a Governing Board that should consist of wraparound care providers, delivery partners, key stakeholders, and representation from schools both running and not running on site provision to offer a varied and diverse perspective. Furthermore, the Board would hold officers to account, decide on the allocation of funding, monitor and review the implementation of the delivery plan, and would meet 6 times a year over the 2 years of the programme funding.

Members discussed the report's proposal and considered different methods, before settling on approaching the Primary Heads Forum to secure a representative from the schools to the governing board. Officers welcomed representatives from Secondary Schools to join the Governing Board if they wanted to participate and highlighted that the Members would be updated at future meetings.

**Resolved:**

**That Schools Forum recommend that a representative for Wiltshire schools should be secured through the Primary Heads Forum.**

29 **Confirmation of Dates for Future Meetings**

The date of the next meeting of the Schools Forum was confirmed as Thursday 17 October 2024 at 1.30pm and was planned to be held remotely via Microsoft Teams.

Future meeting dates were confirmed as below:

12 December 2024 – 1.30pm

23 January 2025 – 1.30pm

13 March 2025 – 1.30pm.

30 **Urgent Items**

There were no urgent items.

(Duration of meeting: 1.30 - 3.05 pm)

The Officer who has produced these minutes is Ellen Ghey of Democratic Services,  
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[communications@wiltshire.gov.uk](mailto:communications@wiltshire.gov.uk)

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# Agenda Item 8

## Schools Forum (SF)

### School Funding and SEN Working Group (SFWG)

#### MS TEAMS MEETING

23rd September 2024

#### Minutes

**Present:** Marie Taylor (Chair), (Finance, local authority ((LA)), Grant Davis (Finance, LA), Kathryn Davis (Director, Education & Skills), Lisa Fryer (HOS, SEN & Inclusion), Liz Williams (HNB Sustainability Finance Lead), Ben Stevens (HNB Sustainability Strategic Lead), Lisa Percy (Chair of SF / Hardenhuish), John Hawkins (Teacher / Governor rep), Graham Shore (Deputy Chair SF / Holy Trinity), John Read (PHF maintained rep, Lyneham Primary)

**Apologies:** Georgina Keily-Theobald (Downland)

1.	<b>Welcome and Apologies</b> MT welcomed the group to the virtual meeting.	
2.	<b>Minutes</b> There were no outstanding actions.	
3.	<b>Matters Arising</b> There were no matters arising.	
4.	<b>SWFG Membership</b> MT queried the SFWG membership following the recent changes of SF reps. MT to make enquiries when SF induction is offered to the new SF members.	MT
5.	<b>Schools Funding (DSG) Budget Monitoring Report (MT)</b>  MT shared her report & appendices – highlights, underspends in EY due to demand and Schools block small underspend offsets the HNB pressures. HNB pressures in line with demand for services and rising demand patterns – forecast deficit reserve balance to £61.184m at the end of the financial year higher than the SV agreement forecast of £51.027m.  Discussion around opening of Melksham House (April 24) and SAIL whose numbers are growing as leadership is strengthened.  LP Secondary RB – current co-hort physical difficulties, epileptic profiles so appropriately placed and YP thriving at school – avoids Silverwood.  SV payment £26m received last year and £2.2m received in June, £2.2m in September. Adherence to plan will ensure future payments are received.  <i>LP left the meeting to greet prospective parents and so the agenda was rearranged so that Schools Revenue Balances report was taken next</i>	
6.	<b>Schools Revenue Balances (GD)</b> Primary academisations have been steady 21/22 to 23/24	

	<p>Secondary - no secondary academisations but DfE funding for schools with deficit balances in 23/24 helped the overall position.</p> <p>GD working with schools in deficit using the schools budget template to formulate a recovery plan.</p> <p>JR – some schools have high balances? GD confirmed there was a scheme to remove excess balances – we removed this around 12 years ago as unfair to remove from maintained and not academy schools however some LA’s have re-introduced this.</p> <p>GD was asked to take HN to PHF &amp; present position – also include in Governor training</p> <p>GD - high balances made school funding look falsely positive at DfE / national level therefore difficult to lobby for more funding.</p> <p>GS – budget setting principles dictate funds should be applied to operational budgets for the pupils present in the census. Academy trusts are expected to retain 5% in their reserves. Do any new HT need support with finance competency, so they are more confident to allocate funds and not hold back for emergencies?</p> <p>LW – if there are large ongoing surpluses schools need to be really clear how these are to be spent – governors and HT joint plan</p> <p>JH – SIA may be able to make recommendations</p> <p>KD helpful – Ofsted do not mention finances when they visit</p> <p>GD there is a clawback process – maybe we could issue questionnaire to schools asking them to confirm their spending plans for large balances. MT/GD to progress</p> <p>Falling birth rates are a concern for schools</p> <p>John – we need to have these difficult decisions with schools</p> <p>KD – small schools strategy has changed to school places strategy group to support where any size of school might be struggling.</p> <p>GD confirmed there were recovery plans in place for 14 maintained schools, Chilton Foliat had come out of deficit and cumulatively deficits have reduced.</p>	<p>GD</p> <p>GD/MT</p>
<p>7.</p>	<p><b>SEND Transformation Update (LW)</b></p> <p>SEND &amp; AP strategy now ratified by Cabinet</p> <p>LW took the group through the sustainability plan and SV agreement including the conditions under which the DfE will continue with funding. Conversations with advisers are positive they feel our plan has the right actions but will want to see that the council is generating plans to ensure the deficit can be brought back on track.</p> <p>£5.7m SV capital approved by the DfE for the development of a satellite for Exeter House which releases our own capital for other projects.</p> <p>Significant work taking place resources are identified and we are committed to Early Intervention workstreams. High Needs Sustainability Board on 24 September to consider proposals for the re-working of the sustainability plan.</p> <p>JH – is there a chance the DfE will stop Safety Valve payments? LW next steps, if the DfE considers that the Council cannot bring the plan back on track, would be enhanced monitoring with support and reporting – in that circumstance they pause payments and the deal must be renegotiated.</p> <p>GS are other LAs realigning? LW that information not readily available but we are engaged with other Safety Valve councils via networks run by the LGA and it is the case</p>	

	<p>that some councils are working with the DfE to renegotiate their Safety Valve agreements.</p> <p>JH – we support you good wishes for the discussion at the Board, ISS still my bete noir, are unit costs increasing? MT yes despite commissioners challenging % increases, there are genuine staff pay uplifts at all provisions.</p> <p><b>EHCP Top Up Review</b></p> <p>Still working on consultation for Schools Forum, hope to bring decision to January the position is complex and we aim to reduce re-bandings following this work.</p>	
8.	<p><b>Core Schools Budget Grant (GD)</b></p> <p>New grant announced in July 24 to offset 5.5% pay award for teachers – 7 months grant until funding baselined in 25/26. Paid in December 24 based on Oct 23 data Mainstream schools - formulaic approach, then £610 per place for special schools</p> <p>LF - primary RB impact higher as more teachers proportionally – is this covered in a workstream? LW Staffing mix will be collected. How we inflate year on year will need to be calculated with this in mind.</p>	
9.	<p><b>AOB</b></p> <p>School colleagues gave feedback that Monday mornings were not good for SFWG – MT to change the day of the week from November onwards.</p>	MT
10.	<p><b><i>Date and Time of next Meeting</i></b></p> <p>SFWG 8.30am – date to be agreed – planned as a virtual teams meeting.</p> <p>Schools Forum 1.30pm 12<sup>th</sup> December 2024 – planned as a face to face meeting.</p>	

### Glossary

RB – Resource Base

SV – Safety Valve

DfE – Dept for Education

LGA – Local Government Org

ISS – Independent Special Schools

EY – Early Years

LA – Local Authority

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**Early Years Reference Group Meeting  
Friday 27 September 2024**

**1. Welcome and introductions**

Janer Boulton (JB), Lucy-Anne Bryant (LAB) (Chair), Emma Cooke (EC), Emma Egan (EE), Charlotte Forester (CF), Jenny Harvey (JH) (notes), Julia Honeywell (JHo), Holly Meek (HM), Marie Taylor (MT), Karen Venner (KV)

**2. Apologies**

Lyssy Bolton (LB), Lucy Bracher (replacement Holly Meek HM), Jackie Day, (JD), Lisa Fryer (LF), Sarah Hawkins (SH), Kirsty Merrifield (KM), Debbie Muir (DM), Kai Muxlow (KM), Emily Wood (EW)

Introductions done

**3. Minutes of last meeting (7 June 2024)**

The minutes were agreed as a true record.

**4. Matters arising**

3 – Article still outstanding. EC still to invite Ben Stevens to next Early Years Managers meeting

5 – This will be discussed later in the meeting under agenda item 6.

6 – Still awaiting.

7 – This has been completed but with no real success. The person dealt with post 18 courses only, so a further meeting is needed with the person who deals with post 16 courses. KV recently had a meeting with Louise at Wiltshire College Chippenham who confirmed they were seeing an increase in the number of people registering for courses, especially in Melksham and Trowbridge. KV will forward Louise's email address to LAB and EC. LAB/EC confirmed there is an article in this week's EY newsletter promoting EY as a career along with a national campaign invite.

9 – Completed. It was confirmed at the last meeting that the use of red books was limited; the same experiences were echoed again. CF raised the issue of reduced take-up of immunisations which would have been recorded in the red book, and asked if there could there be a link with reduced health visitor services. LAB/EC confirmed this was a broader issue for discussion with Sally Johnson. EC confirmed her team is currently working on the integrated 2yo check. A survey for working with health visitors will also be sent out to providers shortly, with feedback wanted on what is/isn't working well, and how the offer can be improved. The survey will also be sent to health visitors. KV has been told by health visitors that they aren't allowed to come into settings. All agreed this was a big problem. Several of the group discussed their experiences and possible improvement suggestions, and LAB/EC asked for all this feedback to be recorded in their survey responses.

11 – There is an article in this week's newsletter. JH will send email to the group before the next meeting.

**ACTION:** LAB to add Safety Value Arrangement article in EY Newsletter  
EC to invite Ben Stevens to the next Early Years Managers meeting  
KV to share Wiltshire College contact email address with LAB and EC.  
JH to send email to group ahead of next meeting about Chair position and election

**5. Budget Monitoring (MT)**

MT shared an extract of her Schools Forum paper with the group. The overall EY budget now takes account of the under 2's and universal 2 YO funding and is a total of £54.223 million.

Current forecasts show a £4.487 million underspend with most of this reflected in the 3&4yo area (both universal and working parent entitlement). The largest variance is in the 3&4 year old grant; 10,880 FTE had been budgeted for based on the January census data, and the forecasted take-up is approximately

15% less than planned. There will be post and in year adjustments next year by the DfE, so not possible to redistribute back into the EY sector.

	DSG Allocation from the £m	Wiltshire Transfers £m	Current Annual Budget £m	Forecast Outturn £m	Forecast Outturn Variance £m	% Variance
Early Years Block	54.043	0.180	54.223	49.736	(4.487)	-8%

There is a small underspend in the disadvantaged 2yos area which has done very well with take-up, although LAB confirmed there has recently been a slight drop. Group members commented that there didn't appear to be any drop in demand across any age cohort.

MT reported a higher take-up in 2yos working parent entitlement than forecasted by the DfE.

It is still early days for the under 2's, so no variance is being reported yet. MT hopes to have a better picture for the next meeting in November.

**Table 2 - Early Years Learners**

	Budgeted PTE	Actual PTE	Forecast PTE Variance PTE	Budgeted Spend £M	Forecast Spend £M	Forecast Spend Variance £M
3- & 4-year olds	10,880	9,261	-1,619	32.312	27.744	(4.568)
2-year-olds	727	643	-84	3.101	2.743	(0.359)
2-year-olds with working parents	2,171	2,311	140	8.872	9.445	0.572
Under 2-year-olds	1,311	1,311	0	7.194	7.194	0.000
ISF	374	374	0	1.143	1.143	0.000
	<i>hours</i>	<i>hours</i>	<i>hours</i>			

A variance is currently not being forecast for ISF.

MT reported an 8% underspend across the whole EY block for quarter 1. With the funding expansions this year, it is certainly a year of flux, so MT is not surprised at the significant variances at the moment.

**ACTION: None**

## 6. Childcare Expansion (LAB/NH)

LAB reported that 7 settings offering a total of 48 spaces have received capital funding so far, with 3 already operational and 1 due to open on 30<sup>th</sup> September 2024. 2 further expansion projects are due to open in October and another in January 2025. Expansion is happening and planned in the areas around the county where need is greatest. There hasn't been a huge demand on the budget, with half of the budget spent to date. Interested parties can contact Nicola Harris or any member of the Childcare Sufficiency team, and plans would need to be up and running by September 2025.

LAB and NH confirmed the funding is purely for EY with separate wraparound development plans happening around the county alongside EY. SS reported that £300,000 has already been spent on wraparound plans. LAB confirmed that Wiltshire is doing very well encouraging demand, supply and take-up. LAB also confirmed that whilst Pewsey and Devizes are the main areas of need, other areas will be considered if there is a need.

**ACTION: None**

## 7. Inclusion Support Fund (ISF) (EC)

Since taking on ISF two years ago and making the funding process fit for purpose, EC and her team have been monitoring to check how it is all working.

The overwhelming response from the sector has been that the 2-band system isn't working. Options are currently being explored.

**ACTION: None**

## 8. AOB

LAB raised the issue of the group's Chair position. JHo offered to speak to with MT to find out what would be involved in the role. LAB encouraged other representatives to consider the role and to contact MT to find out more. An election will take place at the next meeting.

JB raised the issue of parent declaration forms and needing them completed in order to submit the Autumn 2024 estimate. This proved incredibly difficult when the provision had just returned from the summer break and the provision generally only see some parents once a week. JB had to drive to houses to get the forms completed. JH commented what whilst it's not detailed in the Provider Agreement, the Council has always advised that providers should not be claiming estimated hours for children for whom they have not got completed Parent Declaration forms in place. JH advised that there had been a few instances where providers had incorrectly claimed estimated funded hours for children when they weren't delivering them resulting in overpayment. JH suggested that due to the specialist nature of DSC's, flexibility could be applied if the DSC was in receipt of a parent email requesting the hours.

KV and EE have noticed a significant increase in work with the entitlement for the under 2's. CF echoed these thoughts and suggested that it would be easier if they could just use the one parent declaration form per child for the whole time they are accessing EYE rather than having different forms for each financial year. LAB and JH said they would investigate parent declarations and how their use could be improved

HM reminded the group about Family Hubs and asked people to reach out if they wanted to find out more or link in with their local hub. Navigators are working with families but are currently not accepting applications for outreach support. This situation will be reviewed. LAB asked for Family Hubs to an agenda item at the next meeting.

MT informed the group about a new grant called Early Years Budget Grant (EYBG) for the period September 2024 – March 2025 to support early years providers with their costs following confirmation of the 2024 teacher pay award. Last year, the funding was paid out equally between the number of teachers in settings. MT enquired whether the same approach was to be used again this year; all agreed. The funding is due to be received in November and paid out in December. JB queried what the definition of a teacher was, and EC confirmed it would be QTS only.

LAB raised the issue about schools setting up nurseries that has been in the news very recently, and stated the team will be looking to ensure existing provision is not affected.

**ACTION: JH to add Family Hubs as an agenda item for the next meeting  
LAB/JH to look at the use of parent declaration forms**

## 9. Date of next meeting

The next meeting is scheduled for Tuesday 26<sup>th</sup> November at 2pm.

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**Wiltshire Council**

**Wiltshire Schools Forum**

**17 October 2024**

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## **Wiltshire Schools Forum Review of Proportionality and Confirmation of Membership**

### **Summary**

The Membership of Schools Forum is reviewed on an annual basis with all those that make appointments (including Primary Heads Forum, Wiltshire Association of Secondary and Special School Heads and the Wiltshire Governors Association) of named representatives to the Forum being asked to confirm those persons for the ensuing academic year.

On 13 June 2024, Officers conducted a review of the balance of membership between maintained primary, maintained secondary and academies and special school members (which must be broadly proportionate to pupil numbers) and this showed that the current membership would not need to be amended as it reflects the current breakdown of the total numbers on roll in schools as at the October 2023 census, updated for academy conversions.

The Terms of Reference of Schools Forum were last reviewed by Schools Forum at their meeting on 6 October 2022 and subsequently approved by the Cabinet Member for Children, Education and Skills on 4 January 2023. As there are no required changes to the proportionality then it is proposed that no changes to the Terms of Reference are required on this occasion.

### **Proposals**

That Wiltshire Schools Forum:

- a) Notes that the proportionality of the Forum has been reviewed and that no changes are recommended.
- b) Notes that no changes to the Terms of Reference as at 4 January 2023 are recommended.
- c) Notes the current Membership details of the Forum.
- d) Notes that there are no current vacancies for Schools Forum, although if any arise that they be appointed to as soon as possible.

### **Reason for Proposal**

To ensure that all types of Wiltshire Schools are represented on Wiltshire Schools Forum and to ensure that the Forum complies with Department for Education (DfE) guidance and relevant legislation.



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**Wiltshire Schools Forum Review of Proportionality and Confirmation of Membership**

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**1. Purpose of Report**

- 1.1 To inform Schools Forum that a review of the proportionality and the annual review of the membership of Schools Forum has been carried out with all those that make appointments (including Primary Heads Forum, Wiltshire Association of Secondary and Special School Heads and the Wiltshire Governors Association) of named representatives to the Forum being asked to confirm those persons for the ensuing academic year. The Terms of Reference have also been reviewed and no changes are proposed.

**2. Proportionality of Membership of Schools Forum**

- 2.1 The table below sets out proportionality of schools in Wiltshire (based on the October 2023 census).

<b>Sector</b>	<b>Pupil Numbers</b>	<b>Current Representation</b>	<b>Vacancies</b>
Maintained Primary	18,910	3	
Primary Academy	18,137	3	
Maintained Secondary	3,204	1	
Secondary Academy	23,959	3	
Special	555	1	
Special Academy	462	1	
Governors		4	
Union		1	
Diocese		1	
Early Years		2	
<b>TOTAL</b>	<b>65,227</b>	<b>20</b>	<b>0</b>

- 2.2 There has been a change to the current pupil numbers (based on the October 2023 census and any academy conversions since the census) but not to the proportionality of the membership of Schools Forum.

See table below:

<b>Sector</b>	<b>Pupil Numbers</b>	<b>Current Representation</b>	<b>Vacancies</b>
Maintained Primary	17,436	3	
Primary Academy	19,517	3	
Maintained Secondary	3,174	1	
Secondary Academy	23,959	3	
Special	605	1	
Special Academy	535	1	
Governors Union		4	
Diocese		1	
Early Years		2	
<b>TOTAL</b>	<b>65,226</b>	<b>20</b>	<b>0</b>

### **3 Terms of Reference**

3.1 The attached Terms of Reference (TOR) (Appendix 1) have been reviewed, however on this occasion it is not considered that any changes are needed following the TOR that were approved by the Cabinet Member for Children, Education and Skills that were approved on 4 January 2023 as a delegated Cabinet Member decision.

### **4. Membership of the Wiltshire Schools Forum**

4.1 The current membership of the Forum is as detailed below:

Five maintained School representatives (3 primary, 1 secondary and 1 special school)

<b>Name</b>	<b>Representing</b>	<b>Appointed by</b>
1. Edward Powe	Maintained Primary	Primary Heads Forum (PHF)
2. John Read	Maintained Primary	PHF
3. Adam Smith	Maintained Primary	PHF
4. Georgina Keily-Theobald	Maintained Special School	Wiltshire Association of Secondary School Heads (WASSH)
5. Nick Norgrove	Maintained Secondary	WASSH

Seven Academy representatives (3 primary, 3 secondary and 1 special school)

Name	Representing	Appointed by
6. Toni Hayzen	Primary Academy	PHF
7. Emily Mullord	Primary Academy	PHF
8. Graham Shore (Vice Chair)	Primary Academy	PHF
9. Brett Jouny	Secondary Academy	WASSH
10. Lisa Percy (Chair)	Secondary Academy	WASSH
11. Helen Carpenter	Secondary Academy	WASSH
12. Nicola Whitcombe	Special School Academy	WASSH

Four elected governor representatives (2 primary, 1 secondary and 1 special school)

Name	Representing	Appointed by
13. Stella Fowler	Primary School Governor	Wiltshire Governors Association (WGA)
14. Ros Sutton	Primary School Governor	WGA
15. David Whewell	Secondary School Governor	WGA
16. Aileen Bates	Special School Governor	WGA

Two Early Years representatives are the only members allowed to vote on the funding formula.

Name	Representing	Appointed by
17. Lyssy Bolton	Early Years	Early Years Reference Group
18. Karen Venner	Early Years	EYRG

Two other nominated service partner representatives (1 from the Diocese and 1 teacher representative) who both have one vote. These are the **20** voting members.

Name	Representing	Appointed by
19. John Hawkins	Teaching Association	
20. Giles Pugh	Salisbury Diocesan Board of Education	Salisbury Diocesan Board of Education

In addition to voting members, the following representatives will have **observer** status:

Name	Representing	Elected by
i. Jo Grenfell (Nikki Barnett sub)	Post-16 (Wiltshire College)	Wiltshire College
ii. Trudy Srawley	Wiltshire Parent Carer Council	Wiltshire Parent Carer Council

iii. TBC (Chair of WCFVSF)	Wiltshire Children and Families Voluntary Sector Forum	Wiltshire Children and Families Voluntary Sector Forum
iv. Ross Henning	Local Youth Network	Local Youth Network
v. Any ESFA representative could attend SF meetings	Education & Skills Funding Agency	ESFA

## 5. Proposals

### 5.1 That Wiltshire Schools Forum:

- a) Notes that the proportionality of the Forum has been reviewed and that no changes are recommended.
- b) Notes that no changes to the Terms of Reference (as agreed on 4 January 2023) are recommended.
- c) Notes the current Membership details of the Forum.
- d) Notes that there are no current vacancies for Schools Forum, although if any arise that they be appointed to as soon as possible.

## 6. Reason for Proposal

- 6.1 To ensure that all types of Wiltshire Schools are represented on Wiltshire Schools Forum and to ensure that the Forum complies with Department for Education (DfE) guidance and relevant legislation.

**Kathryn Davis**  
**(Director – Education & Skills)**

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Report Author: Lisa Pullin

Democratic Services Officer  
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1 October 2024

## Appendices

- 1 – Current agreed Terms of Reference for Schools Forum

**WILTSHIRE SCHOOLS FORUM**  
**TERMS OF REFERENCE**

**1. Remit**

The Schools Forum is a statutory body which the LA is required to consult on the following functions:

**1.1 Consultation on School Funding Formula**

- (1) The relevant LA shall consult the forum on:
  - (a) Any proposed changes in relation to the factors and criteria that were taken into account, or the methods, principles and rules that have been adopted, in their formula made in accordance with regulations made under section 47 and 47ZA of the School Standards and Framework Act 1998; and
  - (b) The financial effect of any such change.
- (2) Consultation under paragraph (1) shall take place in sufficient time to allow the views expressed to be taken into account in the determination of the relevant authority's formula and in the initial determination of schools' budget shares before the beginning of the financial year.

**1.2 Consultation on Contracts**

- (1) The relevant authority shall at least one month prior to the issue of invitations to tender consult the forum on the terms of any proposed contract for supplies or services being a contract paid or to be paid out of the relevant authority's schools budgets where the estimated value of the proposed contract is not less than the specific threshold which applies to the relevant authority in pursuance of Regulation 8 of The Public Contracts Regulations 2006 (SI 2006 No 5).

**1.3 Consultation on Financial Issues**

- (1) The relevant authority shall consult the forum annually in respect of the relevant authority's functions relating to the schools budget, in connection with the following:
  - (a) The arrangements to be made for the education of pupils with special educational needs;
  - (b) Arrangements for the use of pupil referral units and the education of children otherwise than at school;
  - (c) Arrangements for early years provision;
  - (d) Administrative arrangements for the allocation of central government grants paid to the schools via the authority.
- (2) The relevant authority may consult the forum on such other matters concerning the funding of schools as they see fit.

## **2. Composition**

- 2.1 The requirements for the Schools Forum were previously set out in regulations (Statutory Instrument No 344/2010, amended by 1172/2010). These regulations have been revoked and replaced by the Schools Forums (England) Regulations 2012 (Statutory Instrument No 2261/2012) as amended. The constitution of the Wiltshire Schools Forum has been approved by the Cabinet Member for Children's Services through the delegated decision process, and any change to the constitution will require similar approval.
- 2.2 The majority of forum members are "schools members".
- 5 elected Maintained School Head teacher representatives (1 secondary school, 3 primary schools and 1 special school)
  - 7 Academy Head teacher representatives (3 secondary school, 3 primary schools and 1 special school)
  - 4 elected governor representatives (1 secondary school, 2 primary schools and 1 special school).

These 16 members, along with the two Early Years representatives are the only members allowed to vote on the funding formula.

There are 2 other nominated service partner representatives (1 from the Dioceses and 1 teacher representative) who both have one vote. These are the **20** voting members.

In addition to voting members, the following representatives will have observer status:

- i) Education & Skills Funding Agency
- ii) Post-16 representative
- iii) Wiltshire Parent Carer Council
- iv) Wiltshire Children and Families Voluntary Sector Forum
- v) Local Youth Network.

- 2.3 The Forum will appoint the same number of substitutes in respect of each voting representative group as that group holds ordinary seats on the Forum. Ordinary members may be substituted by any one of the named substitutes. Substitute members will have all the powers and duties of any ordinary member of the Forum.

## **3. Conduct**

- 3.1 In carrying out their functions, members of the Schools Forum are expected to act in accordance with the seven principles of public life set out in the first report of the Committee on Standard in Public Life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership.
- 3.2 Members of the School Forum are required to declare an interest in any individual proposal or service contract which directly affects a school at which they are a



governor, member of staff, or which their children attend or in which they might have a direct pecuniary interest.

#### **4. Term of Office**

- 4.1 The term of office for members of the Schools Forum shall be three years subject to their remaining eligible. A member may resign at any time and is required to leave if he or she ceases to be eligible in the capacity in which elected/nominated.
- 4.2 There is no limit on the number of terms of office to which a member may be elected or re-nominated if still eligible. Where a member is replaced, the new member serves for the remainder of the term of office.

#### **5. Chair and Vice-Chair**

- 5.1 A chair and vice-chair will be elected annually by a majority of votes cast by individual members. Where possible, the chair and vice-chair will not be drawn from the same voting group. The term of office is for one year. A chair or vice-chair will cease to hold office if they resign by giving notice to both the Chair and clerk of the Forum, or if they cease to be members of the Forum. Both the chair and vice-chair may be re-elected. Where a casual vacancy arises, there will be a vote at the next meeting of the Forum.
- 5.2 The responsibilities of the chair and vice-chair include: chairing meetings, overseeing preparation of the record of the meeting, submitting a budget for LA approval and being accountable for expenditure against that budget.

#### **6. Quorum**

- 6.1 The quorum for the Forum is 40% of voting members. A meeting may continue if inquorate, but any advice given to the LA as a result of such a meeting would not have to be taken into account by the authority.

#### **7. Clerk to the Committee**

- 7.1 The clerk will be appointed by Democratic Services at Wiltshire Council.

#### **8. Notice of Meetings**

- 8.1 The clerk will ensure that meetings of the Forum are convened by giving a minimum notice of 5 working days in advance of the meetings, with a full agenda.

#### **9. Proceedings**

- 9.1 Each voting member has one vote and a majority decision is required.
- 9.2 The Forum may remit matters for discussion and research to sub-committees or working groups. However, any resulting advice formally passed to the LA shall have been approved by the Forum as a whole.

9.3 The Forum will meet at least 4 times per annum.

## **10. Public Participation**

- 10.1 Members of the public 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.
- 10.2 Questions must be put in writing to the clerk of the Forum no later than 5 clear working days before the meeting, to allow a response to be formulated, and 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.
- 10.3 Statements must be given in writing and this should be submitted electronically to the Officer named on the Agenda no later than 5pm one clear working day before the meeting.
- 10.4 Statements and questions must be relevant to the powers and duties of the Forum. They 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 must not require the disclosure of confidential information.
- 10.5 The Chairman's ruling on rejection of a question is final.

## **11. Discrimination**

- 11.1 The Committee has an explicit duty to have regard to the duties placed on Local Education Authorities and school governors by the Equality Act 2010. The Forum will note the DfE view that the Human Rights Act 1998 applies.

## **12. Dissemination of the Results of Meetings**

- 12.1 A copy of the minutes of the Forum meetings will be published on the Council's website and communicated to all schools via RightChoice and will be considered by the Children's Services Select Committee and the Cabinet if necessary.

## **13. Consideration of Confidential Reports**

- 13.1 A report will only be considered in a confidential session when it contains confidential or exempt information. That will only apply if the report contains:
- a) Information furnished to the Council by a Government Department on terms which forbid the disclosure of the information to the public.
  - b) Information the disclosure of which to the public is prohibited by or under any law or by the order of a court
  - c) Information relating to any individual.
  - d) Information which is likely to reveal the identity of an individual.

- e) Information relating to the financial or business affairs of any particular person (including the authority).
- f) Information relating to any consultations or negotiations, or contemplated consultations and negotiations, in connection with labour relations matters.
- g) Information in respect of which a claim to legal professional privilege could be maintained.
- h) Information which reveals that the authority proposes to serve certain Notices or make certain Orders or Directions.
- i) Information relating to action taken or to be taken in connection with the prevention investigation or prosecution of crime.

13.2 The intention to conduct Forum business in Confidential Session will be indicated by the inclusion of the following text within the agenda:

‘Exclusion of Public;  
To consider passing a resolution, in accordance with the Wiltshire Council Schools Forum Terms of Reference, that the public be excluded during the remainder of the meeting, on the basis that if they were present during the business to be transacted, there would be a likelihood of disclosure to them of exempt information of the following descriptions’

13.3 The descriptions referred to above relates to the categories of confidential information listed in paragraph 13.1.

13.4 Public would relate to anyone other than members of the Schools Forum plus the Democratic Services Officer, relevant officers and Cabinet members with exceptions determined by the Chair, in consultation with the Director – Education and Skills.

*Agreed by Schools Forum – 6 October 2022*

*Approved by Cabinet Member for Children, Education & Skills – 4 January 2023*

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**Wiltshire Council**

**School Funding Working Group: 23 September 2024**

**Schools Forum: 17 October 2024**

## Schools Revenue Surplus and Deficit Balances 2023/24

### Introduction

1. This report presents the position of revenue balances for Wiltshire maintained schools as at the 31 March 2024 and identifies those in surplus and deficit.
2. The net surplus balances for the financial year 2023/24 are £11.3 million with 95 schools holding surplus balances of £13.1 million and 14 schools in deficit to a value of £1.9 million.
3. In October 2023, members considered a report on schools' balances and deficits as at the 31 March 2023. In that report the net surplus balances were £12.2 million with 104 schools holding surplus balances of £14.4 million and 12 schools in deficit to a value of £2.2 million.
4. The number of LA maintained schools has decreased from 116 to 109 between 31 March 2023 and 31 March 2024. The data in this report does not include those schools which converted during the financial year.

### Main considerations

5. The movement in net revenue balances over the last 3 financial years is shown in the following table: -

	2021/22	2022/23	2023/24	2023/24 Balances as % of 2024/24 Budget Share %	Increase/ Decrease from 2022/23 £	Increase/ Decrease from 2021/22 %
	£	£	£			
Primary	11,319,252	10,106,595	8,574,285	9.34%	-1,532,310	-15.16%
Secondary	708,889	1,067,840	1,426,229	6.76%	358,389	33.56%
Special	1,325,008	1,050,387	1,267,494	8.74%	217,107	20.67%
	<b>13,353,150</b>	<b>12,224,822</b>	<b>11,268,007</b>	<b>26.54</b>	<b>-956,815</b>	<b>*-7.83</b>

\*NB: this represents the total percentage increase/decrease in all schools' balances between 2022/23 and 2023/24.

6. Reporting of net revenue balances can obscure the underlying trend of gross revenue surplus and deficit balances. For transparency, the gross balances are identified below:

	Surplus balances			Deficit balances		
	2021/22 £	2022/23 £	2023/24 £	2021/22 £	2022/23 £	2023/24 £
Primary	12,199,527	10,865,244	9,414,278	-880,274	-758,649	-839,993
Secondary	2,396,774	2,525,619	2,443,267	-1,687,885	-1,457,779	-1,017,038
Special	1,325,008	1,050,387	1,267,494	0	0	0
<b>Total</b>	<b>15,921,419</b>	<b>14,441,250</b>	<b>13,125,038</b>	<b>-2,568,160</b>	<b>-2,216,429</b>	<b>-1,857,031</b>

7. **Appendix 1**, attached to this report details the revenue surplus and deficit balances for individual maintained schools. (For Special Schools, their income comprises Place funding plus Top Up funding for the year.)
8. As part of the dedicated school's grant (DSG) assurance framework, the DfE may ask local authorities to provide additional information where:
- the authority has 5% of schools that have had a surplus of 15% or more for the last 5 years and where the individual surplus is least £10,000 each year. Authorities will only be asked for more information if at least 3 schools meet the criteria.
  - the authority has 2.5% of its schools in deficit by 2.5% or more for the last 4 years and where the individual annual deficit is at least £10,000.
9. **Appendix 2** - analyses the 2023/24 revenue balances to categorise those that are classified as:
- In surplus and above 15% of school budget share
  - in surplus but below 15% of school budget share
  - in deficit
10. **Appendix 3** - demonstrates the Authority may trigger an investigation from the DfE, as described in 8a above, by identifying that 9 schools, (8.2%) have held revenue balances of 15% or more of their school budget share for the last 5 years.
11. **Appendix 4** - demonstrates the Authority may trigger an investigation from the DfE, as described in 8b above, by identifying that 4 schools, (3.7%) have held deficit balances of more than 2.5% and £10,000 for the last 4 years.

### Key points

12. The net revenue balance of £11.3 million in 2023/24 has decreased by £0.9 million (8.91%) from the 2022/23 balance of £12.2 million.
13. Analysis of the gross revenue surplus and deficit balances reveals that between 2022/23 and 2023/24 surplus balances have decreased by 9.1% and deficit balances have decreased by 16.2%.

14. The number of schools in deficit is 14 and the value of the deficits has decreased by £0.36 million from £2.2 million in 2022/23 to £1.9 million in 2023/24.
15. The number of schools in surplus has dropped to 95 in 2023/24. The value of surpluses has decreased by £1.32 million, from £14.44 million in 2022/23 to £13.13 million in 2023/24.
16. The appendices highlight that the Authority may trigger an investigation from the DFE due to the number of schools holding excess revenue or deficit balances.

### **Indicative Position for 2024-25**

17. Whilst its impossible to provide a definitive figure for maintained school balances as at the end of the 2024-25 year, based upon budget template returns received, the forecast position is a drop in balances again in 2024-25, however with the Teachers Pay Award, the recently announced Core Schools Budget Grant and a pending Autumn Statement at the end of October, all coming out post-budget returns, the future is less predictable.

### **Proposals**

18. Schools Forum members are invited to note and comment on this report.

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## Appendix 1

### School revenue balances as at 31st March 2024

School DfE No.	School Name	Committed Revenue Balance	Uncommitted Revenue Balance	Total Revenue Balances	School Budget Share	Balance as % of Budget Share
2003	Fynamore Community	3,819	-47,670	-43,851	1,770,582	-2.48%
2005	Nursteed Community Primary School	12,132	191,701	203,833	920,897	22.13%
2009	Bratton Primary School	0	-166,874	-166,874	669,954	-24.91%
2023	St Pauls Primary School	8,460	18,331	26,791	776,275	3.45%
2027	Marlborough St Mary's	0	51,403	51,403	1,821,170	2.82%
2031	Neston Primary School	7,500	145,843	153,343	887,354	17.28%
2034	Monkton Park Primary School	12,293	75,685	87,978	1,149,079	7.66%
2045	Gomeldon Primary School	0	15,035	15,035	630,979	2.38%
2052	Hilmarton Primary School	0	78,334	78,334	605,196	12.94%
2053	Horningsham Primary School	7,391	-3,719	3,672	459,976	0.80%
2060	Luckington Community School	0	102,909	102,909	367,612	27.99%
2086	Stanton St Quintin Primary School	1,093	55,886	56,979	437,838	13.01%
2087	Ramsbury Primary School	570	40,161	40,730	868,506	4.69%
2091	Harnham Infant School	0	47,928	47,928	1,036,692	4.62%
2136	Westbury Infants	2,304	169,043	171,347	1,132,127	15.13%
2140	Wootton Bassett Infants School	4,724	8,454	13,178	656,781	2.01%
2159	Kiwi School	0	179,142	179,142	1,544,694	11.60%
2168	Priestley Primary School	0	75,939	75,939	1,369,825	5.54%
2170	Grove Primary School	18,940	279,360	298,299	1,641,715	18.17%
2178	Princecroft School	0	100,465	100,465	879,153	11.43%
2180	Redland Primary School	2,363	224,529	226,892	1,349,753	16.81%
2184	Longleaze School	12,266	194,509	206,774	1,116,395	18.52%
2185	Mere School	0	10,377	10,377	965,279	1.08%
2190	Woodlands Primary School	0	-76,546	-76,546	1,022,257	-7.49%
2191	Manor Fields Primary School	0	-28,776	-28,776	1,132,410	-2.54%

2196	Holbrook Primary School	23,440	43,199	66,639	1,049,082	6.35%
2218	Kings Lodge Primary School	44,142	176,790	220,932	1,289,013	17.14%
2222	Walwayne Court Primary School	13,395	180,452	193,847	1,188,855	16.31%
2225	Bitham Brook Primary School	0	314,369	314,369	1,756,139	17.90%
2226	Charter Primary School	10,934	135,585	146,519	1,136,662	12.89%
2227	Newtown Community Primary School	17,433	156,667	174,100	903,978	19.26%
3002	Ashton Keynes C of E Primary School	8,153	67,932	76,085	959,127	7.93%
3013	Box CE Primary School	0	49,053	49,053	738,306	6.64%
3015	Christ Church Primary School	0	262,148	262,148	1,888,442	13.88%
3018	Broad Hinton C. of E. Primary School	0	99,599	99,599	499,122	19.95%
3019	Broad Town C of E Primary School	7,055	112,084	119,139	414,079	28.77%
3020	St. Nicholas Church of England (VC) Primary School	1,883	27,095	28,978	515,809	5.62%
3035	Cherhill CE Primary School	0	-9,628	-9,628	880,989	-1.09%
3040	Colerne CE Primary School	19,180	83,511	102,691	1,085,221	9.46%
3045	St Sampsons CE Junior School	0	175,612	175,612	1,360,439	12.91%
3047	Crockerton Church of England	42,676	257,546	300,222	523,980	57.30%
3048	Crudwell C E Primary School	3,459	17,408	20,867	603,751	3.46%
3049	Collingbourne CE Primary School	13,623	27,419	41,042	527,615	7.78%
3063	Durrington CE Controlled Junior School	2,799	109,869	112,668	834,136	13.51%
3088	Hilperton C. E. Primary School	0	65,191	65,191	714,660	9.12%
3090	Holt V C Primary School	13,275	72,639	85,914	697,948	12.31%
3091	Hullavington Primary School	18,838	175,659	194,497	708,456	27.45%
3096	Kington St Michael CE Primary School	29,030	207,091	236,120	647,779	36.45%
3100	Lacock CE VC Primary School	4,000	40,017	44,017	456,083	9.65%
3102	Langley Fitzurse C.E. School	3,933	92,792	96,725	527,982	18.32%
3104	Lea and Garsdon C.E. Primary School	7,491	5,645	13,136	613,855	2.14%
3134	Newton Tony Church of England Primary School	0	119,810	119,810	513,181	23.35%
3135	North Bradley C of E Primary School	108,392	251,507	359,899	849,916	42.35%
3140	Oaksey CE VC Primary School	414	97,469	97,883	562,447	17.40%
3149	Preshute Primary School	6,819	42,146	48,965	813,224	6.02%
3150	St. Marys C.E. Primary School	5,786	122,006	127,792	1,456,339	8.77%

3158	Harnham Junior School	0	-22,181	-22,181	1,330,832	-1.67%
3163	Sherston (CE) Primary School	0	103,923	103,923	592,323	17.54%
3166	Southwick CE Primary School	9,049	58,303	67,352	852,303	7.90%
3170	Staverton CE Primary School	0	1,519	1,519	1,114,013	0.14%
3172	Stratford-Sub-Castle VC Primary	27,964	-261,132	-233,168	692,046	-33.69%
3174	Sutton Veny CE Primary	0	29,294	29,294	745,626	3.93%
3186	Urchfont CE Primary School	72,370	91,651	164,021	534,503	30.69%
3191	The Minster CE Primary School	0	101,394	101,394	931,366	10.89%
3192	Westbury C.E. Junior School	0	-1,499	-1,499	1,312,008	-0.11%
3193	Westbury Leigh C.E. Primary School	0	-17,179	-17,179	1,357,721	-1.27%
3201	Winterbourne Earls C E Controlled Primary School	4,685	16,246	20,931	864,952	2.42%
3205	Sambourne CE Primary School	4,320	90	4,410	568,967	0.78%
3220	Minety C E Primary School	315	16,442	16,757	626,472	2.67%
3222	St. Barnabas School	0	61,877	61,877	482,027	12.84%
3229	Coombe Bissett School	10,809	33,439	44,248	603,241	7.34%
3239	St Johns CE Primary School	0	2,947	2,947	622,529	0.47%
3242	Brinkworth Earl Danbys CE Primary School	1,314	16,263	17,577	804,797	2.18%
3300	St Michaels CE School	0	27,490	27,490	868,125	3.17%
3306	St Nicholas CE Primary School	8,542	25,673	34,215	528,027	6.48%
3316	Chapmanslade CE VA Primary School	3,338	-1,050	2,287	532,027	0.43%
3318	Chilton Foliat C of E Primary School	5,536	23,618	29,154	560,964	5.20%
3330	Derry Hill C of E (Aided) School	669	29,346	30,015	916,900	3.27%
3362	St. Andrews Primary School	5,203	104,825	110,028	888,649	12.38%
3383	Sarum St. Pauls C.E. (VA) Primary School	6,684	-100,461	-93,777	981,010	-9.56%
3402	Whiteparish All Saints C.E. (V.A.) Primary School	0	105,843	105,843	484,540	21.84%
3418	St Josephs Catholic School	13,876	164,688	178,564	644,183	27.72%
3425	St Osmunds Catholic Primary School	0	46,365	46,365	921,644	5.03%
3430	St Johns Catholic Primary School	22,925	43,572	66,497	1,338,430	4.97%
3435	Wardour Catholic Primary School	0	133,213	133,213	495,374	26.89%
3437	St Patricks RC Primary School	4,911	24,906	29,817	854,481	3.49%
3453	Chilmark Primary School	0	27,162	27,162	405,525	6.70%

3454 Semley CE VA Primary School	0	13,156	13,156	598,252	2.20%
3459 Hindon CEVA Primary School	0	187,739	187,739	466,335	40.26%
3461 Kennet Valley C.E School	9,053	15,957	25,010	478,156	5.23%
3465 Wylve Valley C.E. VA Primary School	0	-36,280	-36,280	603,604	-6.01%
3467 CHURCHFIELDS SCHOOL	17,981	21,684	39,665	680,362	5.83%
3469 Five Lanes CE Primary School	19,935	129,956	149,891	463,847	32.31%
3471 Lyneham Primary School	0	44,149	44,149	1,317,148	3.35%
3472 Bellefield Primary & Nursery School	2,638	109,882	112,520	1,397,163	8.05%
4000 Abbeyfield School	42,050	-1,059,088	-1,017,038	5,856,195	-17.37%
4070 The Stonehenge School	0	878,650	878,650	6,090,500	14.43%
4610 St Josephs Catholic School	109,258	317,602	426,860	3,765,786	11.34%
5201 Downton CE VA Primary School	14,338	-100,234	-85,896	1,193,358	-7.20%
5205 Frogwell Primary School	29,062	167,523	196,585	1,164,777	16.88%
5206 Studley Green Primary School	22,290	157,479	179,769	1,313,133	13.69%
5207 St.Georges Catholic Primary School	270	-24,607	-24,337	647,310	-3.76%
5209 Paxcroft Primary School	0	175,649	175,649	1,357,702	12.94%
5215 Castle Primary School	115,880	353,236	469,116	1,338,997	35.03%
5218 Clarendon Junior School	46,809	76,190	122,999	1,315,634	9.35%
5219 Clarendon Infants School	18,728	76,590	95,318	1,123,365	8.49%
5415 Matravers School	94,572	1,043,184	1,137,756	5,398,388	21.08%
7003 Silverwood School*	11,182	285,258	296,440	11,407,827	2.60%
7007 Downland School*	0	971,053	971,053	3,087,105	31.46%

<b>109 Schools</b>	<b>1,256,561</b>	<b>10,011,446</b>	<b>11,268,007</b>	<b>127,449,662</b>	<b>8.84%</b>
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\* - For the Special Schools, the % is calculated based upon the Total income for the year which consists in the main of 'Place' funding, plus the Top Up funding for the school.

ANALYSIS OF REVENUE BALANCES 2023/24

School Phase	Surplus balances above 15% of School Budget Share				Surplus balances below 15% of School Budget Share				Deficit Balances			
	Number	Balance Value	2023/24 Budget Share	% of Budget	Number	Balance Value	2023/24 Budget Share	% of Budget	Number	Balance Value	2023/24 Budget Share	% of Budget
Primary	29	£5,579,436	£23,985,660	23.3%	61	£3,834,842	£54,264,122	7.1%	13	-£839,993	£13,594,080	-6.2%
Secondary	1	£1,137,756	£5,398,388	0.0%	2	£1,305,510	£9,856,285	13.2%	1	-£1,017,038	£5,856,195	-17.4%
Special	1	£971,053	£3,087,105	31.5%	1	£296,440	£11,407,827	0.0%	0	£0	£0	0.0%
<b>Total</b>	<b>31</b>	<b>£7,688,245</b>	<b>£32,471,153</b>	<b>23.7%</b>	<b>64</b>	<b>£5,436,792</b>	<b>£75,528,234</b>	<b>7.2%</b>	<b>14</b>	<b>-£1,857,031</b>	<b>£19,450,275</b>	<b>-9.5%</b>

Number of schools 109      Total Balance £11,268,007

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**Analysis of LA schools (as at 31st March 2024) that have had revenue balances in excess of 15% of their total School Budget Share (excluding Pupil Premium Grant) in the last 5 years**

DfE No	School Name	Type	2019/20 %	2020/21 %	2021/22 %	2022/23 %	2023/24 %	2023/24 Balance	Notes
2005	Nursted	Primary	15.3	26.9	24.8	21.0	22.1	↑ £ 203,833	
2027	Marlborough St Mary's	Primary	18.0	19.4	15.3	-	-	↓ £ 51,403	Converted 01/04/2024
2031	Neston	Primary	-	-	-	16.4	17.3	↑ £ 153,343	
2060	Luckington	Primary	-	-	-	21.6	28.0	↑ £ 102,909	
2086	Stanton St Quintin	Primary	-	-	-	17.9	-	↓ £ 56,979	
2136	Westbury Infants	Primary	-	-	-	-	15.1	↑ £ 171,347	
2159	Kiwi School	Primary	-	-	19.8	22.1	-	↓ £ 179,142	
2170	Grove	Primary	-	-	15.7	18.9	18.2	↓ £ 298,299	Converted 01/06/2024
2180	Redland	Primary	-	-	22.7	21.7	16.8	↓ £ 226,892	
2184	Longleaze	Primary	-	-	17.2	18.8	18.5	↓ £ 206,774	
2218	Kings Lodge	Primary	-	-	15.4	20.7	17.1	↓ £ 220,932	
2222	Walwayne Court	Primary	-	-	-	-	16.3	↑ £ 193,847	
2225	Bitham Brook	Primary	-	-	-	-	17.9	↑ £ 314,369	
2227	Newtown	Primary	-	-	20.7	21.1	19.3	↓ £ 174,100	
3013	Box Primary	Primary	16.9	22.5	18.4	-	-	£ 49,053	Converted 01/04/2024
3015	Christ Church	Primary	24.5	32.2	33.9	25.7	-	↓ £ 262,148	
3018	Broad Hinton	Primary	15.2	17.0	15.6	18.6	20.0	↑ £ 99,599	
3019	Broad Town	Primary	-	-	19.6	27.1	28.8	↑ £ 119,139	
3020	St Nicholas CE VC	Primary	15.5	-	-	-	-	£ 28,978	
3045	St Sampson's	Primary	-	18.6	21.1	19.2	-	↓ £ 175,612	
3047	Crockerton	Primary	32.9	38.8	40.2	43.8	57.3	↑ £ 300,222	
3049	Collingbourne CE	Primary	-	17.8	-	-	-	£ 41,042	
3088	Hilperton	Primary	-	-	20.3	16.2	-	£ 65,191	
3090	Holt	Primary	-	-	15.3	16.1	-	↓ £ 85,914	
3091	Hullavington	Primary	30.1	34.6	27.9	25.8	27.5	↑ £ 194,497	
3096	Kington St Michael	Primary	-	-	30.2	30.4	36.5	↑ £ 236,120	
3102	Langley Fitzurse	Primary	-	20.4	20.4	30.4	18.3	↓ £ 96,725	
3104	Lea & Garsdon	Primary	15.5	21.6	18.7	-	-	£ 13,136	
3134	Newton Tony	Primary	-	-	31.3	31.2	23.4	↓ £ 119,810	
3135	North Bradley	Primary	29.2	36.9	41.8	43.7	42.4	↓ £ 359,899	Converted 01/06/2024
3163	Sherston	Primary	-	-	-	-	17.5	↑ £ 103,923	
3166	Southwick CE	Primary	20.3	24.0	22.9	18.8	-	↓ £ 67,352	Converted 01/06/2024
3186	Urchfont CE	Primary	50.7	58.9	23.4	29.6	30.7	↑ £ 164,021	
3191	The Minster CE	Primary	16.7	19.6	21.4	16.7	-	↓ £ 101,394	
3222	St Barnabas	Primary	-	-	16.1	23.7	-	↓ £ 61,877	
3306	St Nicholas	Primary	-	-	16.9	-	-	£ 34,215	
3402	Whiteparish	Primary	19.1	22.8	18.9	27.5	21.8	↓ £ 105,843	
3418	St Joseph's Catholic	Primary	26.3	32.3	31.5	28.8	27.7	↓ £ 178,564	
3425	St Osmunds	Primary	-	-	27.0	20.7	-	↓ £ 46,365	
3435	Wardour	Primary	-	-	-	25.9	26.9	↑ £ 133,213	
3459	Hindon	Primary	-	-	-	30.8	40.3	↑ £ 187,739	
3469	Five Lanes	Primary	-	-	-	19.7	32.3	↑ £ 149,891	
4070	Stonehenge	Secondary	-	-	15.2	20.3	-	↓ £ 878,650	
5205	Frogwell	Primary	-	-	29.0	22.7	16.9	↓ £ 196,585	
5206	Studley Green	Primary	16.4	21.7	18.4	16.1	-	↓ £ 179,769	Converted 01/06/2024
5207	St George's	Primary	-	-	16.5	-	-	-£ 24,337	
5215	Ludgershall Castle	Primary	18.8	24.5	29.3	30.0	35.0	↑ £ 469,116	
5218	Clarendon Juniors	Primary	16.6	22.3	17.5	-	-	£ 122,999	
5219	Clarendon Infants	Primary	21.6	22.7	16.6	-	-	£ 95,318	
5415	Matravers	Secondary	-	19.0	27.3	25.9	21.1	↓ £ 1,137,756	
7007	Downland	Special	36.2	42.7	43.3	42.6	31.5	↓ £ 971,053	
<b>Total number schools</b>			<b>20</b>	<b>23</b>	<b>39</b>	<b>40</b>	<b>30</b>	<b>£10,162,562</b>	

**% of schools with revenue balances of 15% and over of school budget share for the last 5 years**

As at 31st March 2024, 9 LA schools have held surplus balances of 15% or more of school budget share, for the last 5 years

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### Analysis of schools that have been in a deficit position in the last four years, 2020/21 to 2023/24

		2020/21		2021/22		2022/23		2023/24	
		Deficit £	As a % of SBS	Deficit £	As a % of SBS	Deficit £	As a % of SBS	Deficit £	As a % of SBS
2003 Fynamore Primary	Primary	-	-	-	-	-	-	-43,851	-2.48%
2009 Bratton Primary School	Primary	- 8,820	-1.5	-117,652	-17.49	-65,336	-9.71%	-166,874	-24.91%
2178 Princecroft	Primary	-	-	-35,672	-4.33	-	-	-	-
2190 Woodlands	Primary	-	-	-	-	-68,900	-7.03%	-76,546	-7.49%
2191 Manor Fields	Primary	-	-	-	-	-39,051	-3.63%	-28,776	-2.54%
3035 Cherhill	Primary	-	-	-	-	-	-	-9,628	-1.09%
3140 Oaksey CE VA	Primary	-18,462	-4.36	-	-	-	-	-	-
3158 Harnham Junior	Primary	-	-	-	-	-	-	-22,181	-1.67%
3172 Stratford Sub Castle	Primary	-280,594	-45.52	-359,261	-54.92	-378,782	-57.91%	-233,168	-33.69%
3192 Westbury Juniors	Primary	-	-	-	-	-5,204	-0.43%	-1,499	-0.11%
3193 Westbury Leigh	Primary	-96,400	-7.1	-	-	-3,772	-0.27%	-17,179	-1.27%
3229 Coombe Bissett	Primary	-	-	-8,396	-1.49	-	-	-	-
3216 Chapmanslade	Primary	-	-	-13,464	-2.57	-4,632	-0.88%	-	-
3318 Chilton Foliat CE	Primary	-118,014	-30.33	-114,251	-22.39	-39,880	-7.82%	-	-
3383 Sarum St Paul's	Primary	-60,206	-6.83	-69,516	-7.63	-120,835	-13.27%	-93,777	-9.56%
3465 Wylde Valley	Primary	-3,282	-0.77	-935	-0.18	-16,714	-3.15%	-36,280	-6.01%
3469 Five Lanes	Primary	-16,264	-4.08	-	-	-	-	-	-
3471 Lyneham Primary	Primary	-32,832	-2.51	-85,861	-6.65	-	-	-	-
5201 Downton	Primary	-23,783	-2.45	-26,279	-2.35	-15,544	-1.39%	-85,896	-7.20%
5207 St Georges	Primary	-	-	-	-	-	-	-24,337	-3.76%
4000 Abbeyfield	Secondary	-1,943,168	-36.82	-1,687,885	-35.24	-1,457,779	-30.44%	-1,017,038	-17.37%
<b>Total value of deficits</b>		<b>-2,601,824</b>		<b>-2,519,172</b>		<b>-2,216,429</b>		<b>-1,857,031</b>	
<b>Total number of schools</b>			11		11		12		14

As at 31st March 2024, 4 of the 109 LA maintained schools held a deficit of more than 2.5% and £10,000 for the last 4 years

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**Schools Forum Funding & SEN Working Group**  
**23 September 2024**

**Schools Forum**  
**17 October 2024**

**DEDICATED SCHOOLS BUDGET – BUDGET MONITORING 2024/25**

**Purpose of the Report**

1. To present budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2024-25 as at Quarter 1 2024/25 (June 2024).

**Main Considerations**

2. Appendix 1 and 2 to this report outlines the budget monitoring summary as at the end of the first quarter of the financial year including activity information for demand driven budgets.
3. An overspend of £9.983 million is currently forecast against the overall schools budget after the transfer of £28.254 million from the deficit reserve, agreed at budget setting and in line with the Council's Safety Valve agreement. The main driver for this forecast variance is the on-going pressures on the high needs block, the reasons for these are known and understood.
4. As the local authority must make arrangements to finance this pressure, some expenditure in the Schools Budget is ultimately financed from the DSG reserve. The drawdown upon this reserve since 2018 has created a deficit reserve position. In acknowledgement of deficits held by local authorities, which are estimated at £2.6bn nationally, the government introduced a three-year statutory override in 2020 which separates local authorities' DSG deficits from their wider financial position, this has now been extended until 2026.
5. Wiltshire's planned transfer from the DSG reserve was agreed as part of the budget setting process and was £28.254million. The overspend forecast of £9.983 million on the grant plus this transfer from reserves mean the overall estimated DSG pressure in 2024/25 is therefore £38.147m.
6. Table 1 below shows the forecast variances by individual DSG block.

	DSG Allocation from the £m	Wiltshire Transfers £m	Current Annual Budget £m	Forecast Outturn £m	Forecast Outturn Variance £m	% Variance
Early Years Block	54.043	0.180	54.223	49.736	(4.487)	-8%
Schools Block	364.468	(2.000)	362.468	362.372	(0.096)	0%
High Needs block	73.465	1.984	103.702	118.360	14.658	14%
Central Block	2.644	(0.164)	2.480	2.298	(0.182)	-7%
<b>Overall</b>	<b>494.619</b>	<b>0.000</b>	<b>522.873</b>	<b>532.766</b>	<b>9.893</b>	<b>2%</b>
<b>Planned drawdown from DSG reserve (overspend)</b>					<b>28.254</b>	
<b>Net in year forecast movement to the DSG reserve</b>					<b>38.147</b>	

**Early Years Budgets (Budget £54.223M, forecast variance (4.487M))**

7. The early years budgets are projected to underspend by £4.487m. With effect from 1<sup>st</sup> April 2024, the DfE introduced an extension of the entitlements to 9months to 2 year olds and universal 2 year old offer, the budget is now significantly higher based on the DfE's introductory assumptions on take up. Parental take up of the offer is largely unknown and therefore forecast variances are significant.

**Table 2 - Early Years Learners**

	Budgeted	Actual	Forecast PTE Variance	Budgeted Spend	Forecast Spend	Forecast Spend Variance
	PTE	PTE	PTE	£M	£M	£M
3- & 4-year olds	10,880	9,261	-1,619	32.312	27.744	(4.568)
2-year-olds	727	643	-84	3.101	2.743	(0.359)
2-year-olds with working parents	2,171	2,311	140	8.872	9.445	0.572
Under 2-year-olds	1,311	1,311	0	7.194	7.194	0.000
ISF	374	374	0	1.143	1.143	0.000
	hours	hours	hours			

8. The local authority has a duty of sufficiency in this sector and continues to work closely with providers to support through these challenging times of rising costs and a highly competitive recruitment marketplace.

**Schools Budgets (Budget £362.468M, forecast variance (£0.096M))**

9. The minimal forecast underspend on schools relates to central teams and is helping to offset the overall pressure on the DSG.

**High Needs Budgets (Budget £103.7026M, forecast variance £14.658M)**

10. The High Needs budgets are projected to overspend by £14.658m. For this financial year, the budgets have been increased by the planned drawdown from the DSG reserve. For high needs this is £28.254m. This facilitates improved budget monitoring, setting targets and measuring success in recovery planning.
11. The major driver of the increased cost is volume. Activity (volume) is measured in FTE – full time equivalent pupils. Full variance analysis is provided at Appendix 2. It is important to note that the number of EHCPs being requested continues to increase post pandemic.

**Table 3 - Number of EHCP Learners**

	Children with an EHCP in Wiltshire	Prior Year Data (2023-24)	Prior Year Data (2022-23)
As at June 2024	5,867		
Estimate as at 31 <sup>st</sup> March 2025 (based on estimates for SV Plan)	6,100	5,605	4,762
Annual movement	495	843	391
% Movement	8%	15%	8%

12. The biggest pressures are in mainstream provision and independent sector provision. The forecast takes into account the additional capacity delivered within Wiltshire special schools and resource bases. The number of Education Health and Care Plans is higher than forecast and this pressure is impacting on spend across all high needs provision. The number of EHCPs at the end of quarter one in 2024/25 is 5,867; an increase of 706 plans on the same quarter last year.

13. Full detail on all activity data forecasts can be found at Appendix 2 and 3, highlights of the demand in FTE are included in Table 4 below.

**Table 4 - High Needs Learners activity**

	Budgeted Volume FTE	Actual Volume FTE	Volume variance FTE	% change in volume	Actual unit rate
<b>Wiltshire School Provision</b>					
Special School Places	1,063.75	1,063.75	0	0%	£10,000
Special School Top Ups	1,341.88	1,205.16	(137)	-10%	£14,285
ELP Places	343.61	343.61	0	0%	£6,000
ELP Top Ups	522.53	547.33	25	5%	£5,387
Resource Base Places	478.83	478.83	0	0%	£6,000
Resource Base Top Ups	605.22	597.39	(8)	-1%	£7,040
Secondary Resource Place Top Ups	37.49	53.92	16	44%	£6,759
Named Pupil Allowance - Prim	900.68	1,143.37	243	27%	£6,224
Named Pupil Allowance - Sec	506.63	762.25	256	50%	£6,224
Additional Top Up Support	171.62	310.81	139	81%	£14,168
Transition Support Funding	313.25	336.76	24	8%	£3,721
<b>Independent / External Provision</b>					
Independent Special School Fees	313.55	449.04	135	43%	£59,310
6th Form	719.63	780.80	61	9%	£11,404
Wiltshire College Places	436.33	436.33	0	0%	£6,000
Inter Authority Recoupment	260.84	329.82	69	26%	£16,613
Alternative Provision & DP (SEN)	357.75	456.69	99	28%	£14,068

**Table 4 - High Needs Learners price variance**

	Budgeted Price Per annum	Actual Price (Ave) Per annum	Price variance Per annum	% change in price
<b>Wiltshire School Provision</b>				
Special School Places	10,000	10,000	0	0%
Special School Top Ups	13,509	14,285	776	6%
ELP Places	6,000	6,000	0	0%
ELP Top Ups	5,281	5,387	106	2%
Resource Base Places	6,000	6,000	0	0%
Resource Base Top Ups	6,855	7,040	185	3%
Secondary Resource Place Top Ups	7,169	6,759	(410)	-6%
Named Pupil Allowance - Prim	5,790	6,697	907	16%
Named Pupil Allowance - Sec	5,790	5,535	(255)	-4%
Additional Top Up Support	12,617	14,168	1,551	12%
Transition Support Funding	4,000	3,721	(279)	-7%
<b>Independent / External Provision</b>				
Independent Special School Fees	62,842	59,310	(3,532)	-6%
6th Form	12,203	11,404	(799)	-7%
Wiltshire College Places	6,000	6,000	0	0%
Inter Authority Recoupment	15,279	16,914	1,635	11%
Alternative Provision & DP (SEN)	12,617	14,068	1,451	12%

**Central School Services Budgets (Budget £2.298m, forecast variance (£0.182m))**

14. The small forecast underspend in this area is a combination of an underspend on central services and an underspend in admissions due to appeals panel income.

## DSG Reserve

15. The deficit reserve brought forward of £28.706 million is increased by the negative early years block adjustment of £1.030 million. The planned drawdown of £28.254m, forecast overspend of £9.893m and forecast Safety Valve payments of £6.700m will take the reserve into a forecast deficit position of £61.184 million.

**Table 5 - DSG Reserve**

	<b>Safety Valve Agreement £m</b>	<b>Total 2024/25 FY £m</b>
Balance Brought Forward from 23/24	29.447	28.706
Early Years Adjustment (prior year)	0.000	1.030
Planned drawdown from reserve 24/25	28.280	28.254
Actual Variance 24/25	0.000	9.893
In year Safety Valve payments	(6.700)	(6.700)
Balance CFWD 2024/25	<b>51.027</b>	<b>61.184</b>

16. The Council has a Safety Valve agreement in place and performance against that agreement is monitored on a quarterly basis by the Department for Education. Additional actions will need to be put into place in order to ensure that the Council can still deliver on the agreement to achieve in year balance against its high needs budgets by April 2029.
17. A statutory override for DSG deficits is currently in place until the end of the 2025/26 financial year. The statutory override, whilst in place, protects the council from having to make good any DSG deficit from its own reserves. As it currently stands, local authorities will need to demonstrate their ability to cover DSG deficits from their available reserves from 2026/27 onwards unless the override is extended. This continues to present a significant financial risk to the Council.

## Proposals

18. Schools Forum is asked to note the forecast budget monitoring position including the balance on the DSG reserve at the end of June 2024 together with the report later in the agenda on SEND Transformation.

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Appendix 1 – Schools Budget Forecast Position as at 30th June 2024

Service Area	a		b		c		d = (c-b)		e = (d/b)		f	g	
	Current Annual Budget	Period 3	Period 3 Forecast	Variance	23/24	Outturn	Variance	23/24	Outturn	Variance	April forecast	Budget	Move-ment from Previous
	£m	£m	£m	%	£m	£m	£m	%	£m	£m	£m	£m	£m
Three to Four Year Olds EY Entitlement Funding	32.312	27.744	(4.568)	-14.14%	(0.946)	0.000	(4.568)		0.000	0.000	(0.359)		
Two Year Olds EY Entitlement Funding	3.101	2.743	(0.359)	-11.56%	0.045	0.000	(0.359)		0.000	0.000	(0.359)		
Two Year Olds with Working Parents EY Entitlement Funding	8.872	9.445	0.572	6.45%	0.000	0.000	0.572		0.000	0.000	0.572		
Under Two Year Olds EY Entitlement Funding	7.194	7.194	0.000	0.00%	0.000	0.000	0.000		0.000	0.000	0.000		
Early Years Inclusion Support Fund	1.143	1.143	0.000	0.00%	(0.106)	0.000	0.000		0.000	0.000	0.000		
Early Years Pupil Premium & DAF	0.742	0.742	0.000	0.00%	0.005	0.000	0.000		0.000	0.000	0.000		
Early Years Central Expenditure	0.859	0.726	(0.132)	-15.40%	(0.161)	0.000	(0.132)		0.000	0.000	(0.132)		
<b>Early Years Block</b>	<b>54.223</b>	<b>49.736</b>	<b>-4.487</b>	<b>-8.27%</b>	<b>-1.162</b>	<b>0.000</b>	<b>-4.487</b>		<b>0.000</b>	<b>0.000</b>	<b>-4.487</b>		
Schools Budget Shares Primary & Secondary - Local Authority Schools	113.877	113.877	0.000	0.00%	0.000	0.000	0.000		0.000	0.000	0.000		
Schools Budget Shares Primary & Secondary - Academy Schools	245.362	245.362	0.000	0.00%	0.000	0.000	0.000		0.000	0.000	0.000		
De-delegated services incl education functions (maintained schools only)	2.496	2.400	(0.096)	-3.83%	(0.189)	0.000	(0.096)		0.000	0.000	(0.096)		
<b>Delegated &amp; De Delegated Total</b>	<b>361.734</b>	<b>361.639</b>	<b>-0.096</b>	<b>-0.03%</b>	<b>-0.189</b>	<b>0.000</b>	<b>-0.096</b>		<b>0.000</b>	<b>0.000</b>	<b>-0.096</b>		
Growth Fund	0.734	0.734	0.000	0.00%	(0.028)	0.000	0.000		0.000	0.000	0.000		
<b>Schools Block</b>	<b>362.468</b>	<b>362.372</b>	<b>-0.096</b>	<b>-0.03%</b>	<b>-0.218</b>	<b>0.000</b>	<b>-0.096</b>		<b>0.000</b>	<b>0.000</b>	<b>-0.096</b>		
Special School Place Funding	10.638	10.638	0.000	0.00%	0.000	0.000	0.000		0.000	0.000	0.000		
Resource Base (RB) Funding	2.873	2.873	0.000	0.00%	0.000	0.000	0.000		0.000	0.000	0.000		
Enhanced Learning Provision (ELP) Funding	2.062	2.062	0.000	0.00%	0.000	0.000	0.000		0.000	0.000	0.000		
<b>High Needs Block Place funding (all schools)</b>	<b>15.572</b>	<b>15.572</b>	<b>0.000</b>	<b>0.00%</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>		<b>0.000</b>	<b>0.000</b>	<b>0.000</b>		
Named Pupil Allowances (NPA)	8.148	11.860	3.712	45.55%	1.022	0.000	3.712		0.000	0.000	3.712		
Special School Top-Up	18.128	17.215	(0.912)	-5.03%	1.129	0.000	(0.912)		0.000	0.000	(0.912)		
Resourced Base (RB) Top-Up	4.149	4.206	0.057	1.37%	0.067	0.000	0.057		0.000	0.000	0.057		
Secondary Resourced Base (RB) Top-Up	0.269	0.364	0.096	35.60%	0.000	0.000	0.096		0.000	0.000	0.096		
Enhanced Learning Provision (ELP) Top-Up	2.760	2.948	0.189	6.85%	(0.195)	0.000	0.189		0.000	0.000	0.189		
Transitional Support (TSP) payments	1.253	1.253	0.000	0.00%	(0.318)	0.000	0.000		0.000	0.000	0.000		
Additional Top-Up Support	2.165	4.403	2.238	103.36%	0.000	0.000	2.238		0.000	0.000	2.238		
Secondary Alternative Provision Funding	3.011	2.995	(0.016)	-0.52%	(0.476)	0.000	(0.016)		0.000	0.000	(0.016)		
Non Wiltshire Pupils in Wiltshire Schools	0.000	0.000	0.000	0.00%	(0.031)	0.000	0.000		0.000	0.000	0.000		
<b>Devolved to Maintained &amp; Top Ups (all schools)</b>	<b>39.882</b>	<b>45.246</b>	<b>5.364</b>	<b>13.45%</b>	<b>1.199</b>	<b>0.000</b>	<b>5.364</b>		<b>0.000</b>	<b>0.000</b>	<b>5.364</b>		
Wiltshire College Places	2.618	2.618	0.000	0.00%	0.000	0.000	0.000		0.000	0.000	0.000		
Wiltshire Pupils in Non Wiltshire Schools	3.985	5.479	1.494	37.49%	0.853	0.000	1.494		0.000	0.000	1.494		
Post-16 Top-Up	8.782	8.904	0.122	1.39%	0.461	0.000	0.122		0.000	0.000	0.122		
Independent & Non-Maintained Special Schools	19.704	26.633	6.928	35.16%	2.889	0.000	6.928		0.000	0.000	6.928		
SEN Alternative Provision, Direct Payments & Elective Home Education	4.514	6.425	1.911	42.34%	2.639	0.000	1.911		0.000	0.000	1.911		
Education Other than at School (EOTAS)	0.529	0.515	(0.014)	-2.59%	(0.105)	0.000	(0.014)		0.000	0.000	(0.014)		
<b>Funding for Places outside Schools</b>	<b>40.132</b>	<b>50.574</b>	<b>10.442</b>	<b>26.02%</b>	<b>6.736</b>	<b>0.000</b>	<b>10.442</b>		<b>0.000</b>	<b>0.000</b>	<b>10.442</b>		
High Needs in Early Years Provision	0.819	0.779	(0.039)	-4.80%	(0.308)	0.000	(0.039)		0.000	0.000	(0.039)		
Speech & Language	0.560	0.560	0.000	0.00%	(0.205)	0.000	0.000		0.000	0.000	0.000		
Support for AP, SEN & Inclusion	6.737	5.628	(1.109)	-16.46%	(2.231)	0.000	(1.109)		0.000	0.000	(1.109)		
<b>Commissioned AP &amp; SEN Support Services</b>	<b>8.116</b>	<b>6.968</b>	<b>-1.148</b>	<b>-14.15%</b>	<b>-2.744</b>	<b>0.000</b>	<b>-1.148</b>		<b>0.000</b>	<b>0.000</b>	<b>-1.148</b>		
<b>High Needs Block</b>	<b>103.702</b>	<b>118.360</b>	<b>14.658</b>	<b>14.13%</b>	<b>5.190</b>	<b>0.000</b>	<b>14.658</b>		<b>0.000</b>	<b>0.000</b>	<b>14.658</b>		
Section A - Central Licences	0.511	0.468	-0.043	-8.36%	(0.000)	0.000	(0.043)		0.000	0.000	(0.043)		
Section B - Central Provision (Former ESG, Admissions, Schools Forum)	1.781	1.629	-0.152	-8.54%	(0.063)	0.000	(0.152)		0.000	0.000	(0.152)		
<b>Central Provision within Schools Budget</b>	<b>2.292</b>	<b>2.097</b>	<b>-0.195</b>	<b>-8.50%</b>	<b>-0.063</b>	<b>0.000</b>	<b>-0.195</b>		<b>0.000</b>	<b>0.000</b>	<b>-0.195</b>		
Section C - Education Services to CLA, Child Protection in Schools & Early Years & Prudential Borrowing	0.188	0.201	0.013	6.87%	(0.103)	0.000	0.013		0.000	0.000	0.013		
<b>Historic Commitments</b>	<b>0.188</b>	<b>0.201</b>	<b>0.013</b>	<b>6.87%</b>	<b>-0.103</b>	<b>0.000</b>	<b>0.013</b>		<b>0.000</b>	<b>0.000</b>	<b>0.013</b>		
<b>Central School Services</b>	<b>2.480</b>	<b>2.298</b>	<b>-0.182</b>	<b>-7.34%</b>	<b>-0.166</b>	<b>0.000</b>	<b>-0.182</b>		<b>0.000</b>	<b>0.000</b>	<b>-0.182</b>		
<b>PLANNED DRAWDOWN FROM DSG RESERVE AT YEAR END</b>	<b>-28.254</b>	<b>-28.254</b>	<b>0.000</b>	<b>0.00%</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>		<b>0.000</b>	<b>0.000</b>	<b>0.000</b>		
<b>Total Schools Budget</b>	<b>494.619</b>	<b>504.512</b>	<b>9.893</b>	<b>2.00%</b>	<b>3.644</b>	<b>0.000</b>	<b>9.893</b>		<b>0.000</b>	<b>0.000</b>	<b>9.893</b>		

Appendix 2 - Variance Analysis

Volume analysis	h		i		j		k = (j-i)		l = (k/i)		m	n	o	n
	Budgeted Activity	Period 3 Activity	Period 3 Variance	%	23/24 Outturn Volume	Volume movement from Previous Report	2024/25 Average Prices	2023/24 Average Prices						
	FTE	FTE	FTE	%										
Three/Four Year Olds	10,880	9,261	(1,619)	-15%	9,491	-	£5.21	£4.68						
Two Year Olds	727	643	(84)	-12%	722	-	£7.48	£5.75						
Two Year Old With Working	2,171	2,311	140	6%	-	-	£7.17	£0.00						
Under 2 Year Olds	1,311	1,311	0	0%	-	-	£9.63	£0.00						
ISF	374	374	0	0%	289	-	£3,059	£3,059						
<b>Early Years Block</b>							£828	£828						
<b>ACTIVITY DRIVER</b>							£0.53	£0.53						
<b>DATASET</b>	<b>15,463</b>	<b>13,900</b>	<b>(1,563)</b>	<b>-10%</b>	<b>10,502</b>	<b>-</b>								
Sp Sch Place Funding	1,064	1,064	0	0%	911	-	£10,000	£10,000						
RB Funding	479	479	0	0%	413	-	£6,000	£6,000						
ELP Funding	344	344	0	0%	295	-	£6,000	£6,000						
<b>High Needs Block</b>	<b>1,886</b>	<b>1,886</b>	<b>0</b>	<b>0%</b>	<b>1,619</b>	<b>-</b>								
NPA	1,407	1,906	498	35%	1,582	-	£6,224	£5,838						
Special School Top-Up	1,342	1,205	(137)	-10%	1,020	-	£14,285	£13,198						
RB Top-Up	605	597	(8)	-1%	536	-	£7,040	£10,257						
Secondary RB Top-Up	37	54	16	44%	0	-	£6,759	£7,244						
ELP Top-Up	523	547	25	5%	581	-	£5,387	£5,204						
TSP	313	337	24	8%	234	-	£3,721	£4,000						
Additional Top-Up Support	172	311	139	81%	-	-	£14,168	N/A						
<b>Devolved to Maintained &amp; Top Ups (all schools)</b>	<b>4,399</b>	<b>4,957</b>	<b>558</b>	<b>13%</b>	<b>3,954</b>	<b>-</b>	<b>£9,128</b>	<b>£8,359</b>						
Wiltshire College Places	436	436	0	0%	386	-	£6,000	£6,000						
Non Wiltshire Schools	261	330	69	26%	266	-	£16,613	£16,088						
Post-16 Top-Up	720	781	61	9%	666	-	£11,404	£12,125						
Ind & Non-Maint Sp Sch	314	449	135	43%	302	-	£59,310	£67,145						
SEN AP, DP & EHE	358	457	99	28%	673	-	£14,068	£13,779						
<b>Funding for Places outside Schools</b>	<b>2,088</b>	<b>2,453</b>	<b>365</b>	<b>17%</b>	<b>2,293</b>	<b>-</b>	<b>£20,620</b>	<b>£19,460</b>						
High Needs in Early Years Provision	0.819	0.779	(0.039)	-4.80%	(0.308)	0.000	(0.039)							
Speech & Language	0.560	0.560	0.000	0.00%	(0.205)	0.000	0.000							
Support for AP, SEN & Inclusion	6.737	5.628	(1.109)	-16.46%	(2.231)	0.000	(1.109)							
<b>Commissioned AP &amp; SEN Support Services</b>	<b>8.116</b>	<b>6.968</b>	<b>-1.148</b>	<b>-14.15%</b>	<b>-2.744</b>	<b>0.000</b>	<b>-1.148</b>							
<b>High Needs Block</b>	<b>8,374</b>	<b>9,296</b>	<b>922</b>	<b>11%</b>	<b>7,866</b>	<b>-</b>	<b>£12,733</b>	<b>£12,292</b>						

SS, ELP & RB places above those agreed with the DfE are costed to top ups

Appendix 1 - the service forecasts of expenditure as at 30th June 2024 - 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 June this is a measure of volumes of pupil placements / support arrangements





## Wiltshire Council

### Schools Forum Finance & SEN Working Group 23 September 2024

### Schools Forum 17 October 2024

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## Core Schools Budget Grant

### Purpose of report

1. To brief Schools Forum members on the recently announced Core Schools Budget Grant (CSBG).

### Background to the CSBG

2. Members of Schools Forum will be aware that the Department for Education (DfE) recently confirmed their acceptance of the School Teachers Review Body's recommendations for a pay award of 5.5% for Teachers and School Leaders.
3. At the same time as agreeing the pay award, the DfE announced a new grant to support schools for the 7-month period from September 2024 to March 2025. The CSBG will support schools with the existing cost pressures and those arising from the Teachers pay award and proposed Support Staff pay award.
4. Whilst the majority of funding will support mainstream schools and special schools, there will also be a smaller amount of funding to support Early Years and Post-16 cost pressures.
5. The grant will be rolled into core school funding for the 2025-26 financial year, as part of the National Funding Formula. For academy schools, a further tranche of funding will be payable from April 2025 to August 2025 to reflect their financial year cycle and ensure parity with maintained schools.

### Funding Rates

6. The CSBG funding will follow the same formulaic approach adopted by the DfE over recent years for Teachers Pay and Pension Grants. Funding will comprise the following elements
  - a basic per-pupil rate with different rates for primary, key stage 3 and 4
  - a lump sum paid to all schools, regardless of pupil numbers
  - a per-pupil rate for pupils who are recorded as having been eligible for free school meals at any point in the last 6 years (FSM6), with different rates for primary and secondary pupils
  - a 'per place' funding rate for special schools

7. The base funding rates for the CSBG for the 2024 to 2025 financial year are set out in the table below.

<b>Funding – Mainstream Schools</b>	<b>Funding Rate</b>
Primary – per pupil funding	£76
Secondary – KS3 per pupil funding	£108
Secondary – KS4 per pupil funding	£122
Primary – FSM6 per pupil funding	£70
Secondary – FSM6 per pupil funding	£100
Lump Sum per school	£2,900

<b>Funding Special Schools</b>	<b>Funding Rate</b>
Per Place funding	£610

8. Mainstream schools will receive their funding in early December 2024 with allocations being based upon school data taken from the October 2023 census.
9. Special schools will receive their funding in two tranches, firstly in November 2024 and then again in March 2025. The second tranche will take account of any increases in 'place' numbers at special schools between the 2023 and 2024 academic years.

### **Will it Fully Fund the Pay Awards**

10. The DfE has stated that the Teachers pay award of 5.5% will be fully funded in 2024-25 through the CSBG. However, this has been caveated by stating that the CSBG has been calculated to  
*“fully fund the teacher pay award and the support staff pay offer, at the national level, on top of the available headroom in schools’ existing budgets”*
11. The DfE have not defined what is meant by the term *‘available headroom’* and therefore calculating allocations for Wiltshire schools would suggest that the pay awards will not be fully funded but that the CSBG represents a contribution to the additional cost pressures in schools.
12. For the 2024-25 financial year, Wiltshire schools were advised to budget for pay awards of
- a 3.5% award for Teaching Staff and
  - a flat rate uplift of £1,350 for Support Staff
13. Analysis of the impact of the pay awards and the CSBG grant has been prepared, as detailed in Appendix 1. (The Support Staff pay award is still only proposed and not formally agreed at this point)

14. The key points to note from the analysis are
- There are a number of factors that will come into play to determine whether the CSBG and the uplift in core funding in 2024-25 will fully fund the pay awards
  - The final pay award for Teachers is 2% higher than initially budgeted for by schools
  - The Support Staff pay award is based upon the employers proposed pay offer, still subject to agreement
  - The actual cost of the pay awards will exceed the budgeted pay awards creating an overall 'budget gap'
  - The 'budget gap' will be lower than the CSBG for all sizes of schools
  - The CSBG will not cover the full-cost of the pay awards but represents a contribution towards the additional pay costs being experienced by schools
  - The uplift in core funding of 1.4% for the 2024-25 year, will be required to support schools fully fund the staff pay awards
  - In some schools the 1.4% uplift in core funding, coupled with the CSBG, will be insufficient to fully fund the pay awards and these schools will need to draw upon existing resources to support the pay awards

## **Proposals**

15. Schools Forum note the content of the report and the impact of the CSBG on individual school budgets.
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## Appendix 1 – Impact of CSBG on Schools

<b>Core Schools Budget Grant - Impact</b>	<b>Luckington</b> Small School	<b>Chapmanslade</b> Small School	<b>Derry Hill</b> 1 Form Entry	<b>Mere</b> 1 Form Entry +	<b>St Marys</b> 15 Form Entry	<b>Lyneham</b> 15 Form Entry + RB	<b>Christ Church</b> 2 Form Entry	<b>St Josephs</b> Small Secondary	<b>Abbeyfield</b> Medium Secondary	<b>Stonehenge</b> Large Secondary
Number on Roll	45	99	209	225	312	335	431	601	714	1064
Teaching Staff (FTE)	3.26	5.7	8.28	10.6	14	17	17.9	42.01	48.72	62.12
Impact of budgeted 3.5% Uplift	£4,587	£7,232	£11,472	£14,172	£19,813	£22,012	£23,504	£58,762	£67,037	£82,990
Impact of Actual 5.5% Uplift	£7,208	£11,364	£18,027	£22,271	£31,136	£34,591	£36,935	£92,343	£105,350	£130,418
<b>Cost Pressure of Higher Pay Award (Budget Gap)</b>	<b>£2,621</b>	<b>£4,132</b>	<b>£6,555</b>	<b>£8,100</b>	<b>£11,323</b>	<b>£12,580</b>	<b>£13,431</b>	<b>£33,581</b>	<b>£38,313</b>	<b>£47,427</b>
<b>Support Staff (FTE)</b>	2.49	4.55	10.27	10.42	16.58	20.68	19.21	24.21	33.79	46.08
Budgeted Uplift of £1,350 + On Costs per FTE	£4,625	£8,452	£19,078	£19,356	£30,799	£38,415	£35,684	£44,972	£62,768	£85,598
Expected Uplift of £1,290 + On Costs per FTE	£4,420	£8,076	£18,230	£18,496	£29,430	£36,708	£34,099	£42,974	£59,979	£81,794
<b>Cost Pressure of Lower Pay Award (Budget Gap)</b>	<b>-£206</b>	<b>-£376</b>	<b>-£848</b>	<b>-£860</b>	<b>-£1,369</b>	<b>-£1,707</b>	<b>-£1,586</b>	<b>-£1,999</b>	<b>-£2,790</b>	<b>-£3,804</b>
Total Budgeted Pay Awards	£9,212	£15,684	£30,549	£33,528	£50,612	£60,427	£59,189	£103,735	£129,806	£168,588
Actual Pay Awards	£11,628	£19,441	£36,256	£40,767	£60,566	£71,299	£71,034	£135,317	£165,329	£212,211
<b>Pay Awards Cost in excess of budget (Budget Gap)</b>	<b>£2,416</b>	<b>£3,756</b>	<b>£5,707</b>	<b>£7,239</b>	<b>£9,954</b>	<b>£10,872</b>	<b>£11,845</b>	<b>£31,582</b>	<b>£35,523</b>	<b>£43,623</b>
<b>Core Schools Budget Grant (CSBG)</b>	<b>£6,670</b>	<b>£11,334</b>	<b>£20,324</b>	<b>£22,660</b>	<b>£31,324</b>	<b>£31,166</b>	<b>£37,126</b>	<b>£85,500</b>	<b>£106,781</b>	<b>£139,712</b>
<b>Surplus CSBG above budgeted pay awards</b>	<b>£4,254</b>	<b>£7,578</b>	<b>£14,617</b>	<b>£15,421</b>	<b>£21,370</b>	<b>£20,294</b>	<b>£25,281</b>	<b>£53,918</b>	<b>£71,257</b>	<b>£96,089</b>
<b>Shortfall for covering Full Pay Award</b>	<b>-£4,958</b>	<b>-£8,107</b>	<b>-£15,932</b>	<b>-£18,107</b>	<b>-£29,243</b>	<b>-£40,133</b>	<b>-£33,908</b>	<b>-£49,817</b>	<b>-£58,548</b>	<b>-£72,499</b>
School Budget 2024-25	£364,160	£565,712	£976,114	£1,049,071	£1,490,466	£1,564,933	£1,950,405	£3,900,454	£5,017,109	£6,527,133
Equivalent Budget 2023-24	£359,132	£557,902	£962,637	£1,034,587	£1,469,888	£1,543,327	£1,923,476	£3,846,602	£4,947,839	£6,437,015
Uplift in Core School Funding of 1.4%	£5,028	£7,811	£13,477	£14,484	£20,578	£21,607	£26,929	£53,852	£69,270	£90,118
<b>Amount to be met from existing resources</b>	<b>£70</b>	<b>-£296</b>	<b>-£2,455</b>	<b>-£3,623</b>	<b>-£8,664</b>	<b>-£18,527</b>	<b>-£6,979</b>	<b>£4,035</b>	<b>£10,721</b>	<b>£17,619</b>

Wiltshire Council

School Funding Working Group – 23 September 2024

Schools Forum – 17 October 2024

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## SEND Transformation Update

### Purpose of the Report

1. To update Schools Forum on the SEND Transformation Programme.

### Background

2. The SEND transformation programme brings together all the changes we're progressing in SEND in Wiltshire.
3. The programme includes:
  - a. The new SEND, Inclusion and AP Strategy (2024 – 2029): Meeting Needs Together – Ambitious for All.
  - b. The High Needs Sustainability Plan and Safety Valve agreement which sets out how we will improve outcomes while reducing our deficit.
  - c. Any changes that need to be made following external inspection or review.
4. The most important aim of the programme is to improve outcomes for children and young people with SEND in Wiltshire. We believe that through improved outcomes, especially by shifting resource 'up stream', we can meet our other primary driver: financial sustainability.

### The SEND and AP Strategy 2024 to 2029

5. The new SEND and AP strategy "Meeting Needs Together – Ambitious for All" was approved by Cabinet on 17 September 2024. The Strategy has six key priorities which will be underpinned by a clear implementation plan and oversight via the Local Area SEND and AP Board:
  - **Priority 1:** Children and young people and their families will be at the centre of planning, their views and aspirations heard and acted upon, as true partners.
  - **Priority 2:** Getting the right support at the right time, identifying and acting on our children's needs at the earliest opportunity and through promotion of inclusive approaches and practice across the local area.
  - **Priority 3:** Provide opportunities for timely planning, reflective of the views of the child or young person and parent carers' current needs, that have clear outcomes.
  - **Priority 4:** Ensure good quality communication and information, for families to have a positive experience when navigating services, with information that is easy to access and use.
  - **Priority 5:** Professionals and officers across the SEND system will have the skills, knowledge and training to enable effective collaboration across services, joint assessments and sharing of good practice.

- **Priority 6:** Children and young people will be prepared for adulthood and experience timely transitions, leading to increased skills, greater independence, and a greater range of opportunities in life.

6. The strategy document is attached as Appendix 1 to this report.

### High Needs Sustainability Plan

7. Appendix 2 to this report details the Safety Valve monitoring report sent to the DfE at the end of August 2024. It is a requirement of the agreement with the DfE for the council to report against the key conditions of the agreement, and on progress to deliver capital projects associated with the agreement.

8. These conditions are:

1. The authority undertakes to reach a positive in-year balance on its Dedicated Schools Grant (DSG) account by the end of 2028-29 and in each subsequent year.
2. The authority undertakes to control and reduce the cumulative deficit, not exceeding £84.5m in financial year 2024/25.
- 3.1. Provide earlier support for children and young people with SEND, improving inclusion practices and managing pressure points and school transitions;
- 3.2. Prevent the need for escalation by providing the right support, first time, including a more holistic response alongside health and social care, with improved management and communication;
- 3.3. Increase the number of special school placements, resourced provision, and alternative provision to ensure that children and young people can access the support they need, with proper reintegration support for children who belong in mainstream provision;
- 3.4. Improve transition pathways to provide a range of opportunities for young people with SEND to prepare for adulthood, including training, further education, and employment;
- 3.5. Foster a culture of change across the Wiltshire SEND and AP system by engaging with partners and parent carers, improving trust and coproduction across the sector.

9. The August monitoring report, Appendix 2, is the second monitoring report that has been sent to the DfE. This report covers the activity and data from June to August. Each submission of a report, on time, releases the next Safety Valve payment.

10. The first payment of £26.8m was received by the council on 28 March 2024. A further payment of £2.233m was received in June 2024 following submission of the first monitoring report to the DfE.

11. Appendix 2 contains a detailed update, data and graphs, but in summary, while significant steps forward have been taken, and much of the planned 'activity' is on track, the time from implementation of a project to the realisation of the benefits is greater than had been anticipated.

12. Financially, this means that the council is not on track to meet agreement condition 2 and will exceed the forecast £84.5m cumulative deficit (excluding Safety Valve

payments) in this financial year. The consequences of this are set out in the financial implications section of this report.

13. The status of the other conditions is set out below:

- Condition 3.1: While the project activity to deliver this condition remains on track, the data is not showing the impact of those interventions yet. The growth in the number of EHCPs has exceeded our forecast figures, and while the growth in EHCNA requests has slowed it remains at a high level. Consequently, this condition is rated amber- off track.
- Condition 3.2: The activity that was planned to support this agreement condition is on track and, while the number of children placed in the Independent Sector remains historically high it has not increased, as a percentage, over the past school year. This condition is therefore rated as green – on track.
- Condition 3.3: Despite significant progress, this condition remains amber – off track, as was the case last month. This is primarily due to the uncertainty around the Safety Valve capital funding which has still not been confirmed. The decision, due in March, was initially delayed by a request for more information, and then further delayed by the General Election and subsequent change in ministerial team.
- Condition 3.4: This workstream is amber – off track, and it is expected to be back on track by November. There is a lot of work happening in post 16 and transitions, however this needs to be more focussed and structured. The authority has recently taken on a new project manager to focus on developing this programme and it is expected that significant progress will be made in the next reporting period.
- Condition 3.5: This deal condition is currently green – on track. The authority has continued to engage partners and parent carers to ensure that trust remains high.

14. The monitoring report submitted to the DfE at the end of August confirms that the Council is not on track to meet the condition to reduce the cumulative deficit, not exceeding £84.5m (excluding Safety Valve payments) in financial year 2024/25. The current forecast projects an overspend against the plan of £10.156m in 2024/25.

15. Initial modelling has taken place to consider the impact of the increased commitments in the system from activity in the current year, and the further mitigations that need to be implemented in order to reduce spend by the 2028/29 financial year. This initial work indicates that the residual deficit at the end of the plan will increase by £34.5m compared with the agreed Safety Valve plan. The plan will be re-worked in order to fully confirm the impact in time for the November submission to the DfE.

16. The profile of the revised forecast is summarised as follows:

	<b>Outturn 2023/24</b>	<b>Forecast 2024/25</b>	<b>Forecast 2025/26</b>	<b>Forecast 2026/27</b>	<b>Forecast 2027/28</b>	<b>Forecast 2028/29</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>
Cumulative DSG deficit - brought forward (deficit at beginning of financial year)	35.214	28.706	61.184	77.319	99.198	99.926
In year DSG deficit (before Safety Valve and local contributions)	20.292	39.177	41.280	28.579	7.428	-0.194
Safety Valve programme contribution	-26.800	-6.700	-6.700	-6.700	-6.700	-13.400
Local general fund contribution	0.000	0.000	-18.445	0.000	0.000	-51.822
<b>Cumulative DSG deficit - carry forward (deficit at end of financial year including SV payments and local contributions)</b>	<b>28.706</b>	<b>61.184</b>	<b>77.319</b>	<b>99.198</b>	<b>99.926</b>	<b>34.509</b>

17. The decision to enter the Safety Valve Agreement crystallises the requirement of a contribution from the council's resources to eliminate the cumulative deficit set out in the plan less any contribution from the DfE. This figure, based on the plan set out, is £70.2m. However, it should also be made explicit that the DfE contribution is a fixed figure therefore if the deficit grows as forecast in the table above, that financial liability resides with the council.

18. The council will be taking an approach of maximising all opportunities to set money aside in a specific earmarked reserve to fund the contribution required. If sufficient funds are not set aside by the end of the plan period (April 2029) then the council will need to identify funding for the residual balance or exceptional financial support will be required from government.

19. In order to deliver the required place sufficiency across the period of the plan a bid to the additional HNPCA grant made available to councils on the Safety Valve programme was made for £5.7m in order to accelerate the delivery of additional special school capacity. At the time of submission of the monitoring report no decision had been made by Ministers on the council's application for capital funding however the council has since been notified that the application has been successful.

## Proposal

20. It is proposed that Schools Forum note the update on the SEND Transformation programme.

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# Meeting needs together - ambitious for all

Our plan for children and young people with SEND  
or in Alternative Provision in Wiltshire 2024 – 2029



# Meeting Needs Together - Ambitious for All.

## Our Plan for Children and Young People with SEND or in Alternative Provision in Wiltshire

Welcome to the Wiltshire SEND and Alternative Provision Strategy 2024-29

Wiltshire's Joint Health and Wellbeing Strategy (2023-32) sets out the vision that 'People in Wiltshire are empowered to live full, healthy and enriched lives.'

Our ambition to achieve this vision rests on ensuring that children and young people get a good start in life, build resilience and get the very best from their education. Offering support to all children, young people and their families, as well as focusing on those who need the help the most, reduces inequalities and improves outcomes.

We are committed to improving our services for children and young people with Special Educational Needs and/or Disabilities (SEND) and their families. We believe that SEND is everybody's business and are focused on providing excellent educational opportunities including alternative provision (AP) for those who need it. We are determined to do everything we can to provide better experiences and outcomes for all our children and young people with SEND in educational settings as well as for those that attend Alternative Provision.

A key to achieving this is placing children, young people and their families at the centre of our work, by ensuring joint working is at the heart of our services. Partners across the local area of Wiltshire are committed to working together with the Wiltshire Parent Carer Council as well as children, young people, parent carers and partner organisations. We know that this approach will mean improved support for children and young people with SEND, so that they have full, healthy and enriched lives.

'Meeting Needs Together - Ambitious for All' sets out our vision, the priorities we will focus on as a partnership and how we will do this work over the next five years. Our aim is to work together to deliver cohesive, holistic support to our children and families and to have the child or young person's aspirations and needs at the centre of our work.

We are developing our plan to reflect the priorities in this strategy. As we implement and measure our progress against each of the priorities, we will provide regular reports to the [SEND and AP Partnership Board](#) on the delivery of this strategy. We will regularly publish the outcomes of our actions on the [SEND Local Offer](#) website, and through an annual report, so that children and young people with SEND, their families and the wider public are fully informed on our progress.



Councillor Laura Mayes – Lead Member for  
Children and Young People and Deputy Leader,  
Wiltshire Council



Councillor Jane Davies – Cabinet Member for SEND,  
Wiltshire Council



Lucy Townsend – Corporate Director of People Services,  
Wiltshire Council



Strategic Director, Wiltshire Parent Carer Council



Gill May – Director of Nursing & Quality, B&NES, Swindon & Wiltshire Integrated Care Board



Kathryn Davis  
Director of Education and Skills,  
Wiltshire Council

## How we produced our strategy, its scope and purpose

We worked jointly on this strategy with the [Wiltshire Parent Carer Council \(WPCC\)](#), our children and young people with lived experience of SEND and AP, our Young Pioneers group, our early years settings, schools and colleges, practitioners, the voluntary and community sector and the [Bath and North East Somerset, Swindon and Wiltshire NHS Integrated Care Board](#).

Over the past year, we have worked together with our families at face-to-face events, through online discussion groups, surveys to our schools and settings, and with children and young people through polls and group discussions. In doing so, we have ensured that the voice of our local area has fully informed the priorities identified and shaped our collective vision.

We are dedicated to working together for better outcomes, through embedding the priorities in this strategy into a delivery plan. We understand that for us to deliver cohesive, holistic support to our children and families we must work together to keep aspirations and needs at the centre of what we do.

A child and young person guide can be found in easy read on the [Wiltshire Local Offer](#) webpages.

## Our Working Together Agreement

The 'Meeting Needs Together - Ambitious for All' Strategy has been developed by working together with parents, carers, children, young people, services and teams within Wiltshire Council, health partners, schools and settings. The title of our strategy was chosen by parent carers and young people, to reflect the commitment to working together. The priorities and actions within the strategy have been formed as a direct result of the work we have carried out together in partnership.

We have written a 'Working Together Agreement', coproduced with families in Wiltshire to reflect the commitment to joint working at the heart of everything we do.

We talked together about what true partnership working looked like and this is our commitment:

### **Working in partnership**

#### **We will all:**

- Agree what each partner will contribute
- Listen and accept that people have different views and perspectives
- Ensure that everyone's contribution is heard and valued equally
- Ensure partners are involved and agree outcomes together
- Do what we say we will do and be accountable

## **Communicating well**

### **We will all:**

- Be honest, transparent and clear
- Show active listening
- Let everyone have a voice that is heard
- Be open and respectful
- Share information promptly and clearly and keep everyone informed when things change

## **Feeling valued and included**

### **We will all:**

- Celebrate strengths, successes, differences
- Have a whole-system holistic understanding
- Recognise and care about lived experiences
- Empower everyone to express their voice so that children, young people and their families feel 'heard'
- Include families in decision making, in the shaping of services and in all planning

## **Feeling welcomed and cared for**

### **We will all:**

- Invest time and sufficient resources
- Be open and welcoming to all
- Treat parents as true partners
- Show empathy, understanding and emotional intelligence
- Give continuous feedback – 'you said, we did'

## Our shared vision

Our shared vision and priorities have been built with young people, parent carers and professionals from across the local area.

**‘To create a future where every young person in Wiltshire has the tools and support needed to thrive and achieve their dreams. We want to support children and young people to be aspirational and hopeful, to increase their confidence, to have the resources to live the futures they want to live and to foster a culture of empowerment and inclusion.’**

Meeting the needs of every child and young person with SEND in Wiltshire is the responsibility of everyone.

- We aim to change culture by embedding our shared vision and values into the practice of everyone who works with children, young people and families, ensuring good communication and a system that makes sense.
- We aim to identify and respond to needs at the earliest opportunity, in ways that value lived experience and expertise, offering personalised care and support.
- We will strive to deliver our services and support in the right place at the right time, ensuring good provision is provided locally and there is an inclusive approach across Wiltshire SEND system, making the best use of resources and ensuring best value for money.
- We will implement this integrated strategy, delivering quality and timely support for those who need it.

### **Our vision will be delivered through six priority areas:**

**Priority 1:** Children and young people and their families will be at the centre of planning, their views and aspirations heard and acted upon, as true partners.

**Priority 2:** Getting the right support at the right time, identifying and acting on our children’s needs at the earliest opportunity and through promotion of inclusive approaches and practice across the local area.

**Priority 3:** Provide opportunities for timely planning, reflective of the views of the child or young people and parent carers’ current needs, that have clear outcomes.

**Priority 4:** Ensure good quality communication and information, for families to have a positive experience when navigating services, with information that is easy to access and use.

**Priority 5:** Professionals and officers across the SEND system will have the skills, knowledge and training to enable effective collaboration across services, joint assessments and sharing of good practice.

**Priority 6:** Children and young people will be prepared for adulthood and experience timely transitions, leading to increased skills, greater independence and a greater range of opportunities in life.

## Priority 1: Children and young people and their families will be at the centre of planning, views and aspirations heard and acted upon, as true partners.

### **What have children and young people and their families told us about this priority area?**

“Help me plan for my future...I want to decide how to share my skills, needs and interests”

*Young Pioneers feedback 2023*

“Make decisions with us, not to us”

*Parent Partnership event 2024*

### **Why is it a priority?**

We must value the lived experience and expertise of children, young people, and their families when we plan together and make decisions about individual needs and support.

We want all children in Wiltshire to be aspirational and hopeful and we know we need to build a culture of empowerment.

We want all children and young people with SEND (Special Educational Needs and/or Disabilities) to feel valued and welcome and in their communities. We know that by giving families a greater voice and by listening and acting upon those views, we can build trust so that parents have more confidence in the services and support they receive.

### **What children and young people and their families will see as a result:**

- They will feel heard within the local area and be able to access help, where required, to express views, wishes and choices.
- Planning and reviews will be person-centred, with the voice of the child, young person and family integral to all planning.
- They will talk confidently about the future and the chosen pathway to adulthood, from school or alternative provision and feel like true partners in the decisions made.
- Opportunities to design new services will be available for all.

## Priority 2: Getting the right support at the right time, identifying and acting on our children's needs at the earliest opportunity and through promotion of inclusive approaches and practice across the local area.

### **What have children and young people and their families told us about this priority area?**

"I want to have my options listened to and I want to get support when I need it"

*Young person's questionnaire 2024*

"The key to all this is prevention... to identify issues and solutions early"

*Parent Partnership Event 2024*

### **Why is it a priority?**

We know that if we work together with families to identify needs, difficulties and challenges early, we can be proactive in putting timely and appropriate action in place to improve a child's life chances.

By continuing to develop a co-ordinated approach to prevention and early intervention, we know we can enable children, young people with SEND and their families to access the right help and support in the right place at the right time.

### **What will children and young people and their families see as a result?**

- An integrated system of early support and intervention with holistic support available across education, health and social care.
- High quality SEN Support will be available in all education settings for those with needs that do not require an Education, Health and Care Plan (EHCP).
- More families and children with SEND will be able to find and engage with services, advice and guidance through our SEND Local Offer website.
- Families will see their community is growing a better network of coordinated local help, that enables them to feel strong, safe, happy and healthy.
- Fewer children and young people with mental health or emotional wellbeing concerns will be escalated to specialist services, as support will be accessed at the point of need.



## Priority 3: Provide opportunities for timely planning, reflective of the views of the child or young person and parent-carers' current needs, that have clear outcomes.

### **What have children and young people and their families told us about this priority area?**

"Know my interests.... let me share my goals for the future"

*Young Pioneers Group 2023*

"Forward planning for the family – describe what other key things will happen and when, during the year."

*Parent/Carer Discussion Group 2024*

### **Why is it a priority?**

We recognise that holistic and timely planning across education, health and care leads to stronger individual outcomes.

We know that when we work together, we are more joined up, efficient and timely in our work, and produce a better experience for our children and young people and their families.

The local area must continue to develop provision in response to emerging demand.

### **What children and young people and their families will see as a result:**

- Children and young people and their families will tell us that their experience is improving and that our plans to support them are timely, person centred, meet their needs, and are jointly produced with them.
- Review meetings that are timely, ensure the child or young person is central to the process, with parent/carers confident in what is planned for their child.
- The local area partnership will use robust evidence to inform the commissioning of provision and services for our children with SEND, including the use of Alternative Provision.

## Priority 4: Ensuring excellent quality communication and information, for families to have a positive experience when navigating services, with information that is easy to access and use.

### **What have children and young people and their families told us about this priority area?**

'Know how to communicate with me'

*Young Pioneers Group 2024*

"Take time to talk to us"

*Parent Carer Discussion Groups 2024*

### **Why is it a priority?**

Families have told us how important it is to have good and easy access to information including for families of children who have an emerging need or are new to our processes.

They have told us that they would like to be able to contact the right person or service quickly, at the point of needing advice.

We must also demonstrate that when we receive feedback, we communicate back how we have listened and improved services as a result.

We want to be better at communicating with children and young people with SEND using their preferred way and by giving them a range of ways to express their needs.

### **What children and young people and their families will see as a result:**

- They will tell us that we have a clear system of consistent and easy to access support services across education, health and care.
- Families will tell us that we are more transparent and open in our approach and that they feel respected and valued as partners.
- We will receive positive feedback from families regarding our advice and guidance in terms of accessibility and quality of information.
- Children, young people and their families will see evidence of planning and provision that reflects their views.
- Parents will feel more confident and less dependent on professionals and services.

Priority 5: Professionals and officers across the SEND system will have the skills, knowledge, and training to enable effective collaboration across services, joint assessments and sharing of good practice.

**What have children and young people and their families told us about this priority area?**

“I wish all the adults who work with me understood my needs”

*Young Person’s Questionnaire comments 2024*

“We need for families and professionals to jointly access and share information”

*Feedback from parents at SEND Engagement Event 2023*

**Why is it a priority?**

We want everyone working with and for children and young people to be knowledgeable about SEND and Alternative Provision and to have the appropriate knowledge, training and skills to be confident in their role.

We need more opportunities for professionals and families to work and learn together, to share skills, knowledge and experience.

We want parent/carers to feel more confident in the support offered in the mainstream school or setting.

We recognise that parent/carers should be seen and treated as ‘experts by experience.’

**What children and young people and their families will see as a result:**

We want everyone working with and for children and young people to be knowledgeable about SEND and Alternative Provision and to have the appropriate knowledge, training and skills to be confident in their role.

We need more opportunities for professionals and families to work and learn together, to share skills, knowledge and experience.

We want parent/carers to feel more confident in the support offered in the mainstream school or setting.

We recognise that parent/carers should be seen and treated as ‘experts by experience.’

## Priority 6: Children and young people will be prepared for adulthood and experience timely transitions, leading to increased skills, greater independence, and a greater range of opportunities in life.

### **What have children and young people and their families told us about this priority area?**

“People need to understand my needs and help me plan for my future”

*Young People consultation groups 2024*

“There should be clear pathways for young people when preparing for adulthood”

*Parent carer discussion groups 2024*

### **Why is it a priority?**

For all young people with SEND, preparation for adulthood should be well planned. We want to ensure that every young person has the support and encouragement they need to get ready for the challenges, so that they can experience increased independence in preparation for adult life. This will need to be at a pace that is right for them and their family.

We want to ensure that there is breadth in our SEND and Alternative Provision Post-16 offer so that young people can work towards their personal goals and aspirations. As they grow up, we want them to feel accepted and valued in their local communities.

We aim for all our children and young people to achieve optimal health in adulthood, including their mental health, and we recognise that collaboration as partners is essential to achieving this goal.

### **What will children and young people and their families see as a result?**

- Young people and their families will see a greater choice of local options, including alternative provision, communicated in a clear and accessible way.
- More young people will meet their outcomes and achieve their aspirations and goals.
- A joined-up approach to employability so that young people can see clear pathways into jobs and careers that are in demand in the local economy.
- More young people will have the confidence and independence to successfully transition to the next stage of their journey to adulthood.

## How we will deliver our strategy, priorities and outcomes and monitor our progress

Professionals in Wiltshire with representative groups and local voluntary organisations understand that we must work together in partnership across education, health and social care, to deliver our strategy.

The priorities identified in our strategy will be included in the [Wiltshire SEND Needs Assessment](#).

We will produce a joint delivery plan that will set out our actions and an outcomes framework to monitor the effective delivery of our action plan.

Our joint strategy will also steer our [SEND Transformation Programme](#) and associated budget recovery plan. The plan links to the strategic priorities and supports improvements in quality.

Our SEND and AP action plan will be overseen by the [SEND and AP Partnership Board](#) with regular reporting on progress against each priority. This group meets on a monthly basis and is attended by professionals across education, health, social care and commissioned services, alongside parent carer representation and youth voice. The Local Area Partnership has set up a new integrated dashboard that will tell us if we are achieving our vision linked to each of the priority areas.

We will also publish regular reports on the Wiltshire SEND Local Offer website at [www.localoffer.wiltshire.gov.uk/](http://www.localoffer.wiltshire.gov.uk/). We will continue to consult with children and young people with lived experience of SEND and AP so that they can tell us how we are doing.



## SAFETY VALVE PROGRAMME OVERVIEW

LA Name	Date Report Submitted	Signed off by S151 Officer & Director of Children's Services	Name & Email Address of Key Personnel	
Wiltshire	28 <sup>th</sup> Aug 2024	Yes	CEO:	Lucy Townsend Lucy.Townsend@wiltshire.gov.uk
			S151 Officer:	Lizzie Watkin Lizzie.Watkin@wiltshire.gov.uk
Do you need additional support from either of our specialist SEND advisers (early years / inclusion) to support the effective delivery of your Safety Valve plan? If yes, please specify which area (early years / inclusion) you would like extra support in, giving a brief overview of how this support would be beneficial.			DCS:	Lucy Townsend Lucy.Townsend@wiltshire.gov.uk
We would welcome support from both the early years and inclusion advisors given the challenges we are facing around demand.  This support would enable us to check that our plans are comprehensive and include current best practice.			Other key contacts for Safety Valve:	Kathryn Davis – Director for Education and Skills Kathryn.Davies@wiltshire.gov.uk Jen Salter – Director for Families and Children's Services Jen.Salter@wiltshire.gov.uk Ben Stevens – Inclusion, SEND and AP Transformation Lead Ben.Stevens@wiltshire.gov.uk Liz Williams – High Needs Block Finance Lead Liz.Williams@wiltshire.gov.uk Lisa Fryer – Head of SEND and inclusion Lisa.Fryer@wiltshire.gov.uk

Is your LA's Safety Valve plan on track?	Yes/No	Commentary
To achieve the Safety Valve agreement's projected deficit in the current year?	No	Significant challenges have been identified this year, stemming from the growth in EHCPs during academic year 2023/24. The full-year financial impact of this growth is only now being seen in the finance data.  This growth has also led to further placements in the Independent Non-Maintained Special School (INMSS) sector which have driven costs up. This does not represent a percentage increase of children placed in INMSS but the numbers are higher.
To achieve a £0 DSG deficit by the end of the Safety Valve agreement?	Yes	While the agreement is off track in year, the plan is still in the early stages and the authority remains committed to recovering this position by year five.  Detailed plans are still being developed to articulate the additional steps that are being taken, and how this will be profiled.

	Yes/No	Commentary
Is your LA's Safety Valve capital project on track?	Yes	£5.7m has been requested to expand Special School provision by 120 places in the south of the county.  The authority has managed to reprofile expenditure to ensure the milestones for this priority project can be met, however this will put other projects at risk without a sufficient funding commitment from central government.

## SAFETY VALVE PROGRAMME OVERVIEW

	Previous challenges which had emerged around securing the site have been resolved, and so this project is able to go ahead.
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### Programme Headlines

This quarter, the biggest drivers of positive change have been (up to 3):

1. The strong relationship with Wiltshire Parent Carer Council (WPCC) and schools has enabled mature conversations and understanding across the system.
2. There has been a willingness to embrace change from teams across the system, despite the complexity and scale of the change required and ongoing concerns about capacity.
3. There has been successful recruitment into teams which will deliver support on the ground in schools. The staff recruited are credible specialists in their field, which is vital to their success.

This quarter, the biggest barrier(s) to successful implementation of the Safety Valve plan have been (up to 3):

1. Lack of confirmation on the capital requested as part of the agreed plan
2. Continued growth in requests driving EHCP numbers
3. Additional demands approaching the end of the school year

This quarter, the best examples of stakeholder engagement around the Safety Valve plan have been (up to 3):

1. The new Stakeholder Reference Panel has been established with a clear process for how they feed into the ongoing projects. This will bring together schools, early years settings, post 16 providers, parent carers and the voice of children and young people to comment on the significant change programmes.
2. There has been very positive engagement with Wiltshire Parent Carer Council and Schools Forum about the planned change to EHCP funding. These open conversations have generated good-will around this, reduced anxiety, and have led to changes in approach that will make the project run more smoothly.

*Alongside your Safety Valve financial and narrative monitoring reports, please share with us the latest strategic data dashboard utilised by your governance oversight board for Safety Valve.*

***NB** This should not be something created for the DfE Safety Valve monitoring process; if you do not have a strategic data dashboard, just let us know.*



## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
Condition 1: The authority undertakes to reach a positive in-year balance on its Dedicated Schools Grant (DSG) account by the end of 2028-29 and in each subsequent year.	Update 1 (May)	<p>The current financial forecast is detailed on the attached finance template.</p> <p>The council is projecting that a positive in-year balance will be achieved by the end of 2028/29 and in subsequent years. However, condition 1 is rated as amber – off track, due to the forecast overspend in the 2024/25 financial year which impacts on subsequent years of the plan. Further proposals are being worked up to increase the mitigations so that an in-year balanced position can be achieved by April 2029 and the detail will be included in the November update.</p> <p>The financial forecast for this quarter indicates that expenditure is not on track to meet the target of £84.5m (before SV contributions) for the cumulative deficit in the 2024/25 financial year. Condition 2 is therefore rated Red because current forecasts indicate an overspend against the current plan of £10.156m in 2024/25.</p> <p>The data shows that the increased spend in the current year is driven by increased activity rather than by unit cost in most types of provision. This reflects the increase in the number of children with EHCPs in the 2023/24 academic year and the projections for activity in the new academic year.</p> <p>Initial modelling has taken place to consider the impact of the increased commitments in the system from activity in the current year, and the further mitigations that need to be implemented in order to reduce spend by the 2028/29 financial year. This initial work indicates that the residual deficit at the end of the plan will increase by £34.5m. Wiltshire Council understands that this is a liability that falls to the authority. Further work to fully quantify the impact of additional mitigations will be reflected in the November report.</p>
	<b>Green</b>	
	Update 2 (August)	
	<b>Amber</b>	
Condition 2: The authority undertakes to control and reduce the cumulative deficit, not exceeding £84.5m in financial year 2024/25.	Update 1 (May)	<p>The data shows that the increased spend in the current year is driven by increased activity rather than by unit cost in most types of provision. This reflects the increase in the number of children with EHCPs in the 2023/24 academic year and the projections for activity in the new academic year.</p> <p>Initial modelling has taken place to consider the impact of the increased commitments in the system from activity in the current year, and the further mitigations that need to be implemented in order to reduce spend by the 2028/29 financial year. This initial work indicates that the residual deficit at the end of the plan will increase by £34.5m. Wiltshire Council understands that this is a liability that falls to the authority. Further work to fully quantify the impact of additional mitigations will be reflected in the November report.</p>
	<b>Green</b>	
	Update 2 (August)	
	<b>Red</b>	
Condition 3.1: Provide earlier support for children and young people with SEND, improving inclusion practices and managing pressure points and school transitions.	Update 1 (May)	<p>While the project activity to deliver this condition remains on track, the data is not showing the impact of those interventions yet. The growth in the number of EHCPs has exceeded our forecast figures, and while the growth in EHCNA requests has slowed it remains at a high level. Consequently, this condition is rated amber-off track.</p> <p>Further data analysis has provided a good understanding of what is driving this growth and this has enabled the development of interventions to address these factors. This programme of work is receiving highest priority from the local authority, ICB, and other partners who understand their role in delivering better support outside of the statutory framework.</p>
	<b>Green</b>	
	Update 2 (August)	
	<b>Amber</b>	
	Update 3 (November)	
	<b>RAG</b>	

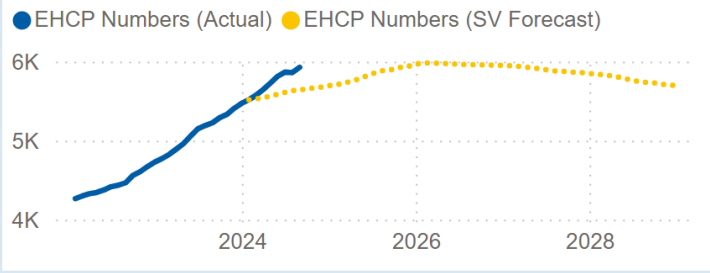
## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition

Assurance Level

Progress Update from this Quarter  
*Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts*

### EHCP Caseload



EHCP Numbers	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24
SV Forecast	5516	5528	5544	5562	5586	5609	5632
Actual	5518	5571	5647	5728	5815	5867	5861

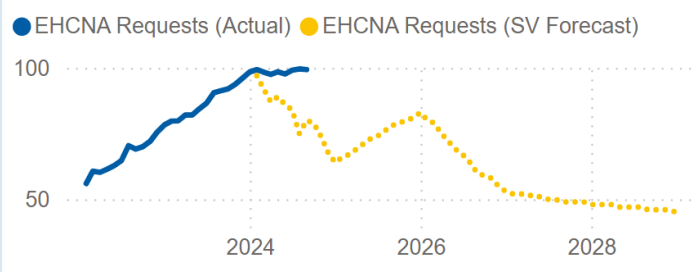
At the end of July, the number of EHCPs in the system was 5,861, 229 ahead of the figure suggested by the Safety Valve Plan.

Much of the growth in the number of EHCPs is due to the continued upward pressure of new needs assessment requests from schools and settings. However roughly 100 of these additional plans are the result of investment put into processing the 20-week-wait backlog faster than expected. This is clearly to the benefit of the children and young people who have been waiting beyond the 20 weeks and provides greater visibility of the needs in the system, however, it does mean that the number of EHCPs is inflated beyond what was anticipated at the time of submission.

Over the past term, teams have been establishing the support required to reduce the growth in EHCP numbers. This has included projects specifically targeted to address these highlighted pressure areas:

- **Continued levels of monthly EHCNA requests** - indicating further work to be done in improving confidence in mainstream inclusion.

### EHCNA Requests (12-month rolling average)



- Early Help Line – This will provide advice and guidance before an EHCNA is considered to explore whether an alternative means of support, such as an Early Support Assessment (ESA), would be more appropriate. The team have been recruited and will be live in October.
- Enhanced training offer – Teams across Education and Skills are providing an enhanced training offer for settings to increase confidence with delivering Ordinarily Available Provision (OPAL) and managing needs at

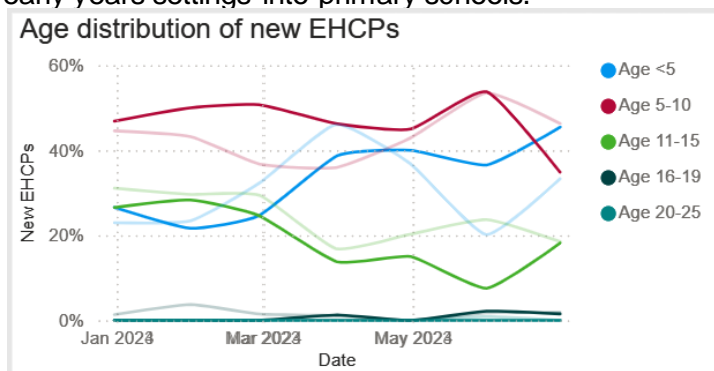
## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
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SEN support to reduce the pressure schools might feel to apply for an EHCNA. Much of this training will be provided free and is ready for delivery from the start of the new academic year

- New approach to Tribunals – By removing much of the Tribunal workload from our SEND Education Officers, they are able to get back into schools to offer support and challenge around EHCNAs and promoting inclusive practice and reducing requests for escalated provision. This new approach will commence from September 2024.

- **Pressures coming from early years** - indicating the need for a retained focus on preschool children, and support in the transition from early years settings into primary schools.



Graph shows this year's referral pattern (darker shade) compared to last year's referral pattern (lighter shade) to show where pressure is coming from which could be placing the forecast off-track.

- EY Pathway Navigator – New posts that will help reduce the pressure for EHCNAs from Early Years by correctly identifying opportunities for alternative support (such as family help or early support) which might be more appropriate for a pre-schooler. These posts have been approved by HR and so recruitment is imminent.
- **Pressures in primary schools** - suggesting that the planned support for inclusive practice should be targeted on primary settings.
  - Ordinarily available Provision for All Learners – the roll-out of OPAL is an ongoing process providing a resource and approach that supports schools with their inclusive practice, instead of moving to an EHCP too early.
  - Mainstream Inclusion Support Advisors – MISAs are new and will go into schools and offer direct advice and support, as well as holding schools accountable for delivery of OPAL. These posts will begin delivery in schools in September.
  - Accreditation for Schools – There are a number of accreditation programmes being coordinated by the council to support schools in delivering better quality support for specific groups. This includes work with the Autism Education Trust (AET), Dyslexia Friendly Schools (DFS) and Practical Inclusion for Neurodiversity (PINS) with the ICB.

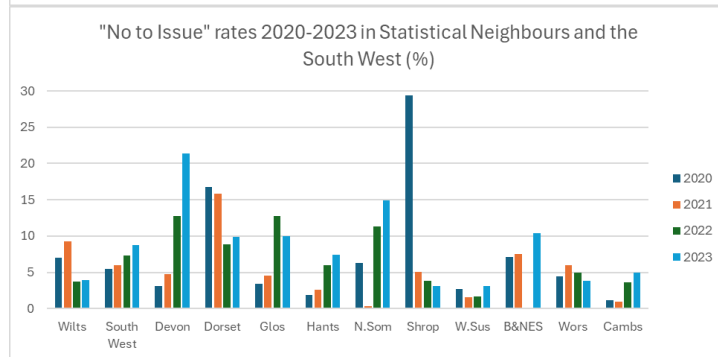
## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition

Assurance Level

Progress Update from this Quarter  
*Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts*

- SEN2 data highlights lower levels of no to assess and no to issue in the authority** - Indicating possible work to ensure that support is available for those who need it, but that the authority is being robust in decision-making.



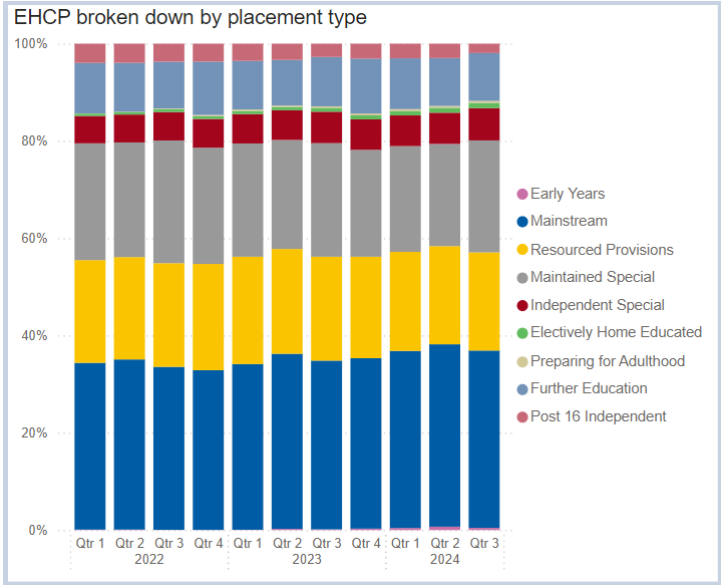
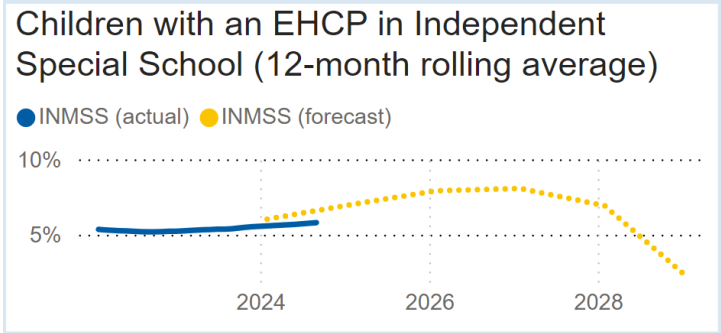
- Continued review of multi-agency groups which make statutory decisions, these groups in Wiltshire are called Discussion and Decision (DaD) groups, and there are clear quality assurance processes which surround them. There are also changes being proposed to the way these groups operate to ensure 'good' decision making.

A further review of the data will be undertaken to support re-baselining so that the financial trajectory is fully understood. However, there is also additional planned activity which is rightly focused on the identified data points.

In the coming term, planned activity to support Condition 3.1 includes:

- Further work around the Wiltshire parents autism support partnership to give parent carers confidence and reduce the likelihood that they seek an EHCNA, because they feel well supported outside of a statutory process. Co-production work is commencing in September 2024 ready for relaunch January 2025.
- Building additional capacity in the Educational Psychology team to enable further preventative work to be undertaken, without impacting the statutory work. These posts are proving difficult to recruit to but remain a focus.
- A Pre-DaD1 triage process is being established to ensure that where applications for statutory assessment lack sufficient evidence, these will be returned with appropriate advice or signposting to support an alternative approach, or a better-quality re-application.
- Development of a specialist support offer in Early Years to ensure that inclusive practice in Early Years settings is well

## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
		<p>supported and effective.</p> <ol style="list-style-type: none"> <li>5. Further work with the ICB and the community provider, HCRG, to understand how to reduce gaps in the confidence of schools and settings to proactively manage health conditions without needing to resort to an EHCP.</li> <li>6. Creation of an SEMH specific graduated response pathway to cater to this growing need in the system.</li> </ol>
<p>Condition 3.2: Prevent the need for escalation by providing the right support, first time, including a more holistic response alongside health and social care, with improved management and communication.</p>	Update 1 (May)	<p>The activity that was planned to support this agreement condition is on track and, while the number of children placed in the Independent Sector remains historically high it has not increased, as a percentage, over the past school year. This condition is therefore rated as green – on track.</p> <div style="text-align: center;">  <p><b>EHCP broken down by placement type</b></p> </div> <div style="text-align: center;">  <p><b>Children with an EHCP in Independent Special School (12-month rolling average)</b></p> </div>
	<b>Green</b>	
	Update 2 (August)	
	<b>Green</b>	
Update 3 (November)	RAG	
		<p>Work has been undertaken to ensure that the right support is provided at the right time to children and young people in the system. This has included multidisciplinary working across a range of settings.</p> <p>The ongoing rollout of Family Hubs has provided a base for this support to work from. This proactive inclusion of social care in the “early help” SEND space will ensure that families have the tools they need to support their child outside of education setting. This more holistic approach will result in fewer Independent Sector placements as families are better able to support and care for their child in the home.</p>

## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
		<p>This multi-disciplinary approach is also being applied to education settings, and the authority is in the process of establishing Multi-Disciplinary Teams within Wiltshire. The MDTs will co-ordinate support for schools and settings, reviewing data to understand where best to deploy resource. This will deliver better support, especially in settings or localities where extra help to improve inclusion is required. These groups will bring together education, health and social care to ensure the support offered is as holistic as possible. Scoping work has been completed and these teams will be fully established and delivering by the middle of the term.</p> <p>As was referenced in the section on Condition 3.1, the authority is investing in an early help line which will be operational from October. This line will provide advice and guidance to parent carers and to school professionals at an emergent stage of SEND need. The helpline is hosted within the Integrated Front Door (IFD) within children's social care. This cross pollination of skills and experience will lead to improved outcomes for children accessing social care who have a SEND need, and for children with emergent SEND needs who would benefit from family support.</p> <p>The ICB and other health partners are fully integrated on the programme board which oversees this work. Senior representation from the community provider HCRG, and the children's mental health service provider Oxford Health, sit on the delivery group to ensure that close working relationships are being developed and fewer children require expensive placements due to lack of joined up support.</p> <p>Work is also underway to ensure that the funding of EHCPs is on a more solid footing. EHCP funding in Wiltshire is based on a 'banding' system, however the figures have not been inflated since they were introduced nearly a decade ago. This has left schools feeling underfunded, and consequently more likely to request a 're-banding' to a higher value band, or to feel unable to meet a child's needs and seek a different higher cost placement. This has moved the system away from being needs led to being funding led.</p> <p>The ambitious target that the system has set itself is to have a new approach to funding EHCP top ups ready for the new financial year (April 2025) to ensure the financial sustainability of the special schools, and to improve the predictability and consistency in the wider school sector.</p> <p>There has not been any evidence that children and young people in Wiltshire are moving 'up provision' in year as numbers remain low. Any shift is likely accounted for through re-banding requests or ad hoc payments and so will be addressed through the EHCP top up payment work.</p> <p>Upcoming work to deliver this agreement condition, in addition to the ongoing project around EHCP top ups, includes:</p> <ol style="list-style-type: none"> <li>1. Development of multi-agency enhanced early-intervention for children with mental-health or emotional wellbeing concerns.</li> </ol> <p>This will cover children and young people for whom those</p>

## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
		<p>concerns form the primary driver of their EHCP, but also those for whom mental health could be a contributing factor to escalating need.</p> <ol style="list-style-type: none"> <li>2. Creation of an enhanced behaviour support offer, particularly to support secondary schools in Wiltshire who do not currently have access to this service. This is in response to concerns from those secondary schools that behaviour is becoming an increasing issue, leading to upward pressure in the system.</li> <li>3. Further work to ensure there is a 'risk based' approach to supporting children and young people for whom some additional, time-bound support could prevent the need to make a request for new provision.</li> <li>4. Development of the Resource Base model and the Enhanced Learning Provision (ELP) to ensure that these approaches are delivering the expected outcomes for cohorts of children for whom these could provide support and a pathway back into mainstream education.</li> </ol>
<p>Condition 3.3: Increase the number of special school placements, resourced provision, and alternative provision to ensure that children and young people can access the support they need, with proper reintegration support for children who can be appropriately supported in mainstream provision.</p>	Update 1 (May)	<p>Despite significant progress, this condition remains amber – off track, as was the case last month. This is primarily due to the uncertainty around the Safety Valve capital funding which has still not been confirmed. The decision, due in March, was initially delayed by a request for more information, and then further delayed by the General Election and subsequent change in ministerial team.</p> <p>This risk is being managed by reprofiling the capital expenditure to ensure that the funding is available for key milestones, however this has placed future sufficiency projects at risk should the capital not come forward.</p> <p>This capital project would provide 120 additional places for Exeter House special school, in the south of the county, where placements are particularly pressured. Since the last progress report, significant milestones have been achieved: successfully identifying and securing a site for this, despite some challenging negotiations.</p> <p>The capital reprofiling has necessitated a slowing down of the plans to develop and roll out new resource bases. While there remains uncertainty about the funding, this cannot be progressed at the pace expected, and this is likely to be seen in placement data and finances from 2025/26.</p> <p>156 new special school places are planned to come online in the new schools year.</p> <ul style="list-style-type: none"> <li>• 50 new places are being created at Silverwood. There were some build delays earlier in the project, however these have largely been clawed back and so handover will take place at the end of the month, with the places ready in January 2025.</li> <li>• 40 new places are being created at Springfields. These places will be available from September but are being phased over the coming months.</li> <li>• 33 new places have been created at SAIL. This new school has had some leadership changes which have reduced the number of places filled, but the expectation is that these will all be filled</li> </ul>
	<b>Amber</b>	
	Update 2 (August)	
	<b>Amber</b>	
Update 3 (November)	<b>RAG</b>	

## SAFETY VALVE PROGRAMME DETAILED UPDATE

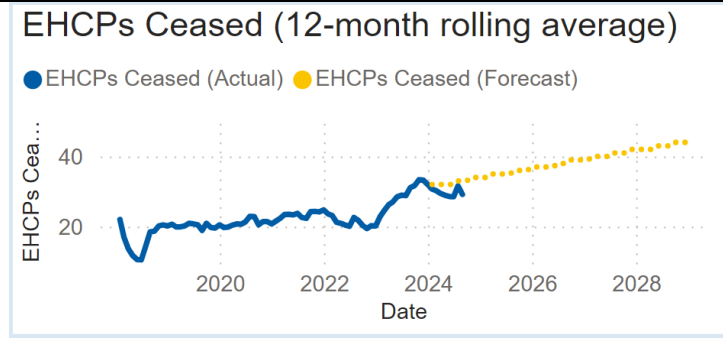
Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
		<p>over the coming school year.</p> <ul style="list-style-type: none"> <li>33 new places have been created at Exeter House in order to meet demand in the south of the county</li> </ul> <p>Following the rigorous commissioning and procurement exercise Brunel Education (a subsidiary company of Brunel Academies Trust) were awarded the contract to deliver education provision from Melksham House on 1st July 2024, at a Wiltshire owned building. The provision will include places for 50 primary age learners with SEMH needs who have a EHCP. The provision will also support a cohort of up to 25 secondary age learners with an EHCP who have SEMH needs. The provider will also be working with the local authority in supporting our outreach model to support the wider system in delivering high quality education for learners.</p> <p>The provider has now commenced the Ofsted registration process which we hope to conclude in early 2025.</p> <p>To ensure a greater continuum of offer for learners, Wiltshire Council is currently undertaking a procurement exercise to appoint a provider to deliver Ofsted registered Alternative Provision from a Wiltshire owned building. The tender process ends on 27th August 2024 with a target date for awarding the contract of 16th October 2024. The provider will then complete the necessary undertakings to ensure Ofsted Registration with a planning opening of Easter 2025</p> <p>This provision will be for 50 secondary age young people, including children with or without an EHCP which aims to have places commissioned by the local authority and schools directly. As with Melksham House, the provider will be expected to support the wider system with an outreach model that delivers high quality education for learners.</p> <p>Upcoming project work to help deliver this deal condition, in addition to continuing the sufficiency work, will include:</p> <ol style="list-style-type: none"> <li>1. Reviewing the provision model in Wiltshire to identify gaps and opportunities, based on the new data analysis that has been undertaken to support the Safety Valve work.</li> <li>2. Developing a proactive approach to identifying and bringing children back into a mainstream setting.</li> </ol>
Condition 3.4: Improve transition pathways to provide a range of opportunities for young people with SEND to prepare for adulthood, including training, further education, and	Update 1 (May)	As was advised in the May update, this workstream is amber – off track, and it is expected to be back on track by November. There is a lot of work happening in post 16 and transitions, however this needs to be more focussed and structured. The authority has recently taken on a new project manager to focus on developing this programme and it is expected that significant progress will be made in the next reporting period.
	Amber	
	Update 2 (August)	
	Amber	
	Update 3 (November)	
	RAG	



## SAFETY VALVE PROGRAMME DETAILED UPDATE

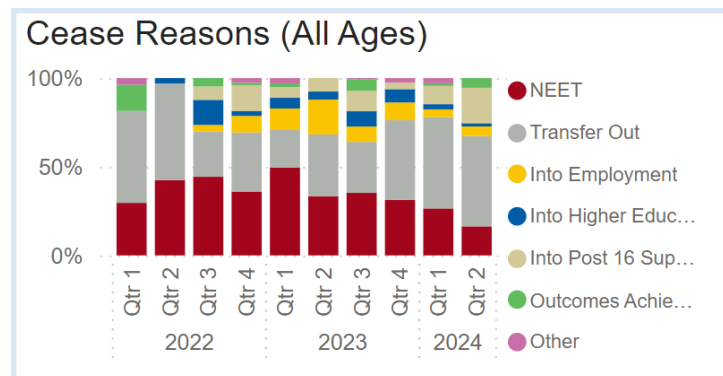
Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
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employment.



The data in this area is encouraging. Despite staff capacity challenges in the Preparation for Adulthood team, the number of ceased plans is similar to the record number achieved last year. The expectation is that this number will be exceeded.

Also encouraging is that the percentage of plans ceased because the young person no longer wishes to engage with education or training has dropped so far this year. This suggests that plans are being ceased for the 'right' reasons and are not creating more NEET young people.



The Post 16 Partnership and Strategy group has continued to establish since the last monitoring report. Partners meet on a regular basis to identify progress against priority actions and to ensure that work is moving forwards. This has led to a greater focus on developing employment and education pathways as well as work towards improved transition planning.

More capacity is coming into the Preparation for Adulthood team to support with caseloads in that team, and the Wiltshire Employment Support Team (WEST) have also taken on four new staff to develop supported apprenticeships and employability skills. These staff will start in October,

Upcoming project work to support this agreement condition includes:

1. Continued development of the education and employment pathways open to young people with EHCPs. This will include how these options are communicated.
2. Further work on the Post-16 strategy group to ensure that the workstreams which are already ongoing are fully aligned and feeding into the broader agenda.
3. Improvements to the collection and recording of post-16 data,

## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
		<p>as a step towards a more comprehensive understanding of where Wiltshire's young people are, and what their destination is.</p> <p>4. Integration of SEND ambition into the new Economic Strategy for Wiltshire to ensure that the development of employment pathways is linked to broader economic need.</p>
<p>Condition 3.5: Foster a culture of change across the Wiltshire SEND and AP system by engaging with partners and parent carers, improving trust and co-production across the sector.</p>	Update 1 (May)	<p>This deal condition is currently green – on track. The authority has continued to engage partners and parent carers to ensure that trust remains high.</p> <p>Key to this has been the establishment of the Stakeholder Reference Panel, which will bring schools and settings, parent carers, and children and young people voice together into a room once a term to discuss the development of the transformation projects. An initial meeting of the group has been held, and the first substantive meeting is happening in October.</p> <p>The agenda for the meetings is driven by the members themselves to ensure that they are able to discuss the project which most interest them, and which they feel most keen to comment on. After the meeting, a “You Said, We Did” report is generated so that members can recognise how we responded to their comments and will be able to see the direct impact that they had on the projects.</p> <p>Alongside this ‘showpiece’ engagement event, project managers are continuing to bring stakeholder voices into their work on a regular basis. This mirrors the commitment shown to co-design during the development of the plan. At an early stage in the projects, representative groups are given the chance to feed in. This includes Wiltshire Parent Carer Council (WPCC), Schools Forum, and the System of Excellence Steering Group.</p> <p>System of Excellence Steering Group is made up of the special school headteachers, and representatives from mainstream schools, early years, the ICB and post 16 providers. This group have had a substantive impact on the work that is happening in the Wiltshire system and are a key part of driving culture change.</p> <p>Partners also make good use of surveys, and several short surveys have been deployed since the last update report. These surveys have allowed a ‘temperature check’ on upcoming pieces of work and have ensured that the project team have correctly understood how stakeholders would describe the need.</p> <p>The annual survey provider that Wiltshire used to use, POET, will not be operating any more and significant steps have been taken to understand what will replace this survey. The ultimate aim is for a simple set of questions that allow sophisticated analysis to be done to fully understand the system.</p> <p>These metrics will be used to measure the effect of culture change efforts in the system and to understand where the council needs to improve communication, in terms of what is said, how it's said and</p>
	<b>Green</b>	
	Update 2 (August)	
	<b>Green</b>	
	Update 3 (November)	
	<b>RAG</b>	

## SAFETY VALVE PROGRAMME DETAILED UPDATE

Agreement Condition	Assurance Level	Progress Update from this Quarter <i>Please include/refer to relevant data and evidence to support your rating and explain the scale of any impacts</i>
		where it is said.

RAG	Definition
	Savings/cost avoidance and/or workstream(s) complete
	Savings/cost avoidance and/or workstream(s) remains on target
	Savings/cost avoidance and/or workstream(s) are currently off target, with plans to mitigate
	Savings/cost avoidance and/or workstream(s) are off target

## SAFETY VALVE PROGRAMME RISK REGISTER

Risk	Assurance Level	Mitigation	Progress Update from this Quarter
<p>Risk 1: There is a risk that <b>unpredictability in the system</b> could lead to the authority failing to meet financial targets despite the plan working.</p>	Update 1 (May)	<p>The authority needs to remove as much unpredictability from the system as possible. This will include:</p> <ol style="list-style-type: none"> <li>1. Clearing the backlog of EHC needs assessments to remove the unknown risk around those plans.</li> <li>2. Map and improve financial decision-making to ensure it is clear and has the right level of scrutiny and rigour.</li> <li>3. Increase the visibility of financial decision-making in the system to all partners so that they are better able to forecast accordingly.</li> </ol>	<ul style="list-style-type: none"> <li>• The investment in additional agency Educational Psychologist capacity has removed 130 plans from the backlog. This is removing uncertainty from the system.</li> <li>• Work has begun to look at how EHCPs are funded. This will rebalance the system and lead to a reduction in ad hoc funding payments, and requests to increase banding which are not needs lead.</li> <li>• Mapping of financial processes has been completed and is now being used to inform improvements to the way those processes work.</li> </ul>
	<b>Green</b>		
	Update 2 (August)		
	<b>Green</b>		
<p>Risk 2: There is a risk that a <b>failure to maintain trusted relationships</b> could fundamentally erode faith in the inclusive vision for our SEND system</p>	Update 1 (May)	<p>The authority will continue to hold stakeholders close to this work and co-design the projects with them. The messaging and communication will emphasise the importance of co-design and of improved outcomes from children and young people with SEND. Quick-wins early in the project will deliver tangible improvements for stakeholders and children and young people with SEND.</p>	<ul style="list-style-type: none"> <li>• The Stakeholder Reference Panel has been established and is beginning to operate. This brings together representative voices from children and young people, schools, settings, post 16 and from parent carers to discuss transformation projects.</li> <li>• The commitment to transparency shown during the development of the plan has continued to be important during the delivery. Open working relationships with Wiltshire Parent Carer Council (WPCC) and Schools Forum have enabled mature conversations about the work.</li> </ul>
	<b>Green</b>		
	Update 2 (August)		
	<b>Green</b>		
<p>Risk 3: There is a risk that partners struggle to engage at the required pace leading to a <b>slower pace of change</b> than is required to meet the plan.</p>	Update 1 (May)	<p>The authority will continue to engage partners and check-in with them about pace of change and progress. Recognising that the financial risk lies with the local authority, the programme team will remain cognisant that other partners will have differing priorities. The authority will ensure that the benefits for other partners are clearly articulated.</p>	<ul style="list-style-type: none"> <li>• Further work has been undertaken to articulate and communicate the positive outcomes for schools and settings.</li> <li>• Key partners, including Schools Forum and the ICB, have reiterated their commitment to the delivery of this plan.</li> </ul>
	<b>Amber</b>		
	Update 2 (August)		
	<b>Green</b>		
<p>Risk 4: There is a risk that <b>failure to access the required capital</b> leaves the system reliant</p>	Update 1 (May)	<p>The authority has put in a request for £5.7m of additional capital through the Safety Valve programme, and this would deliver an extension to a special school in the south of the county. Other projects have</p>	<ul style="list-style-type: none"> <li>• Capital projects have been reprofiled to ensure key milestones are met. This has placed the wider capital programme at risk as the waiting continues for a decision about Safety Valve</li> </ul>
	<b>Amber</b>		
	Update 2 (August)		
	<b>Amber</b>		
	Update 3		

## SAFETY VALVE PROGRAMME RISK REGISTER

Risk	Assurance Level	Mitigation	Progress Update from this Quarter
on expensive independent special school places.	(November) <b>RAG</b>	allocated capital. The authority has considered options to reduce reliance on the capital, essentially derisking the project, but 120 additional places for £5.7m already represents excellent value for money, and Wiltshire has a low number of special school places for a county of its size. It is difficult to imagine an alternative that would reduce reliance on INMSS placements while still meeting the statutory obligations.	capital.
Risk 5: There is a risk that system <b>partners struggle to recruit or resource the changes</b> required in our system leading to failed attempts at change.	Update 1 (May) <b>Amber</b>	The authority must maintain contact with key partners and include them in decision making so that it can take account of the impact of the transformation programme on their services. The authority will also review unintended consequences that might impact partners and will offer support with recruitment where possible.	<ul style="list-style-type: none"> <li>Partners remain fully engaged with the work at a strategic level and so monitoring is underway.</li> <li>Recruitment support for special schools is being delivered to help them get the staff they need to support this transformation.</li> </ul>
	Update 2 (August) <b>Amber</b>		
	Update 3 (November) <b>RAG</b>		

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