

Schools Forum
School Funding and SEN Working Group

MS TEAMS MEETING

27th September 2021

Minutes

Present: Marie Taylor (Chair), (Finance, local authority ((LA)), Grant Davis (Finance, LA), John Hawkins (Teacher / Governor rep), Catriona Williamson (Mere), Andy Bridewell (Ludgershall Castle), Lisa Percy (Hardenhuish), Cate Mullen (Head of Inclusion & SEND, LA), Rebecca Carson (Woodford Valley), Sam Churchill (Hilmarton), Helean Hughes (Director LA), Georgina Keily-Theobald (Downland), Graham Shore (Holy Trinity) and Graham Nagel-Smith (Morgan's Vale & Woodfalls)

Apologies: Simon Thomas and Alison Enever (LA) who will provide updates at the SF meeting. Gary Binstead, (LA) Bea Seggari (LA)

1.	<p>Welcome and Apologies</p> <p>MT welcomed the group to the virtual meeting. A benefit of the virtual meeting is that heads are still located at school and therefore able to dip in and out if required. Several heads had pre-warned MT of this, due to open school events etc.</p>	
2.	<p>Minutes</p> <p>These were considered at Schools Forum in June – no actions outstanding.</p>	
3.	<p>Matters Arising</p> <p>There were no matters arising.</p>	
4.	<p>School Revenue Balances 2020-21 (GD)</p> <p>GD shared his report and appendices showing the year end balances for maintained schools. Overall, schools balances (net) have increased from 2020-21, this could be a combination of factors but likely to include the impact of the pandemic, school closures and COVID funding. There are two flags which could trigger a DfE investigation – firstly around schools carrying a surplus long term and the polar opposite, schools in deficit for an elongated time. The group noted the report and the increased overall net position.</p>	
5.	<p>Budget Monitoring for the period to 31st August 2021 (MT)</p> <p>MT shared her report with the group. The forecast overspend for 21/22 is £8.227m which is slightly less than the last FY overspend so it could increase as the September placements firm up.</p> <p>Highlights: Early Years – (0.083M) small favourable variance, EY will have a separate DSG reserve wef 1st April 2021. COMF rollover & new year allocation of £0.6M which is good news</p> <p>School Budgets – (1.328M) the underspend is largely driven by the growth fund and this offsets the DSG overspend position.</p>	

	<p>The HNB overspend is £9.643m – again, based on higher numbers of EHCPs and levels of support requested.</p> <p>The pressures on the HNB continue and the HNB working group will be prioritising demand management, savings projects, commissioning and spend controls.</p> <p>Of major concern remains the impact of this on the DSG deficit reserve balance which is held in the local authority’s balance sheet. The reserve balance is now forecast to be £26.701m at 31st March 2022.</p> <p>This overspend will continue to be cash flowed by the local authority as per the DfE guidance.</p> <p>There were no comments from the group.</p>	
6.	<p>School Revenue Funding 2022-23 (GD)</p> <p>GD shared his report, £7.1bn national increase for 22-23 with 3% on all pupil led factors Wiltshire, using October 20 census data (so will be updated with the final allocations) 3.33%, HNB 8.39% and CSSB 6.07% increases – no EY updates at this stage 21-22 decisions were taken around mobility, other NFF factors, sparsity (3% uplift not the NFF values), 2.0% MFG, 0.5% transfer to HNB, de-delegation for maintained schools. Schools Forum will be asked to consider factors and make ‘in principle’ decisions in December with the final budget setting voting taking place in January once the DfE final allocations are received late December. MT commented she was most interested to hear about the next 3 years in light of CPI increases, NI increases, teachers pay freeze etc. There is a new spending review period as well as a new Minister, so this is currently unknown.</p>	
7.	<p>DfE Consultations – Autumn 2021 (GD)</p> <ul style="list-style-type: none"> (a) Business Rates – a straightforward change – the DfE will pay the local authority on actual invoices so less of an admin burden on schools and the LA. No financial impact. (b) Fair school funding – the working group met exceptionally early in September to consider this consultation as the deadline for responses was 30/09/21. The Schools Forum response has been shared with school leaders via Right Choice, PHF, WASSH etc to ensure maximum response rate. In Wiltshire we align closely to the NFF so minimum impact however, other changes mooted to central school services block and proposal around moving the financial year to align to the academic year for maintained schools. Officers will report the DfE responses / changes in due course. (c) SEN Review – still overdue and anticipated with no firm date from the DfE. 	
8.	<p>DfE Sparsity Update (GD)</p> <p>GD took the group through the proposed changes to sparsity. Sparsity is only 0.2% of overall school funding. The changes would increase overall funding but also the formula better reflects need – for example, as the crow flies is replaced by miles by road and the distance includes a threshold taper allowing further flexibility < 20%. There are three options</p>	

	<p>of local flexibility until the hard formula in 23/24* (or beyond if further delays)</p> <ul style="list-style-type: none"> (a) Fixed – unaffordable (b) NFF Tapering – this mirrors the DfE funding and would be cost neutral (c) Tapered (old version) – this would cost less than the DfE funded level but not flexible on the distance threshold <p>MT commented that (b) would align Wiltshire to the NFF when it is rolled out in 23/24* GD raised concerns he had around given the formula had been made eminently more sensible and flexible with tapering, if any small Wiltshire schools were in financial difficulties, Schools Forum could face challenge / questions around why this had not been adopted. LP asked are 50 primary and 3 secondary the same schools to receive the funding, whichever method is adopted. SC commented small, rural schools without facilities did incur additional costs e.g.: coach to swimming lessons however, we could use any unallocated funds to help offset the HNB overspend. LP commented that may be robbing Peter to pay Paul and realistically the HNB issue needed support at national level and supporting our small rural schools may have more impact locally.</p>	
9.	<p>High Needs Working Group Update (CM)</p> <p>CM updated the group on the recent updates which included Cabinet approving 35 additional posts in the SEN & Inclusion service around statutory SEN, Ed Psychs and EY inclusion officers – to aid workload and case management in light of the significant increase in demand since the C&F Act in 2014. Recruitment underway. MT commented how bespoke some of the posts were and how important it was to get experienced, skilled staff, CM said there would be a period of time for recruitment and training before we enjoyed the full benefits of the investment.</p> <p>CM updated on the recovery group and the importance of holding each other to account. The recovery plan has three themes; EY & prevention, Statutory Processes & Quality, Assessment & Monitoring. At SF CM will spotlight on the changes made to the internal processes with an external consultant and the three-pronged DaD approach.</p> <p>DaD1 start an assessment? DaD2 issue a plan? Request changes DaD3 high-cost places.) Schools are part of the new processes now and after Christmas, CM wants parents and carers to be involved too.</p> <p>The meetings with the DfE have not provided any new insights however CM conformed that the 5 local authorities who the DfE had offered to assist financially with strict guidelines attached, asked them to focus on their decision making e.g.: Bury. It is hoped these processes should impact positively on HNB funding.</p> <p>Finally, CM shared that there had been articles in the national press recently (Guardian) raising awareness around shortages of SS place, EPS, Sp & L therapists - which families may read and have concerns about.</p>	
10.	<p>Annual Local Consultation – Autumn 2021 (GD)</p> <p>GD took us through the annual consultation questions around de-delegated and a potential 0.5% transfer to HNB from SB.</p> <p>MT commented – would it be useful to add “only if the NFF is affordable would a 0.5% be agreed by SF – the group agreed, GD to action prior to circulation</p> <p>SC – happy to have that and any more detail which would help schools to understand and respond. Better to share the pain across all schools than focus on EHCP pupils. PHF and WASSH can promote. GD and MT to</p>	<p>GD</p> <p>GD/MT</p>

	draft letter to PHF/WASSH to encourage members to respond. GN-S asked whether the impact of the transfer was across all schools – yes, it is and this is to be made clearer so ensure academies engage.	GD
11.	<p>Verbal Updates</p> <p>a) SWAP (Internal Audit) GD shared the SWAP report: Schools forum Governance benchmarking report which was commissioned by another local authority and we (having taken part) benefit from the report. Something for us to pick up is training of new Schools Forum members (this is done for councillors but not other Schools forum reps.)</p> <p>b) COVID Funding DfE COVID recovery premium – based on pupil premium pupils, average £6k for a primary and £20k for a secondary – individual allocations will be on right choice on Friday. DfE Schools Led tutoring is expected next COMF Flexible Pastoral Support – a local authority offer - officers are working with the Alliance on how to best deliver this to schools.</p>	GD/MT
12.	<p>AOB</p> <p>a) There will be an update from Simon Thomas (FACT) at the meeting b) Following the retirement of Neil Baker, a potential Chair and deputy have been approached and have agreed to take up the positions, proposers and seconders needed for the meeting, please.</p>	
10	<p><i>Date and Time of Next Meeting</i></p> <p>It was noted that heads have been called away this morning, is a Monday morning best avoided? MT asked the group their thoughts; no one felt any one day was better than another.</p> <p>December could be a virtual, face to face or hybrid (County Hall technology permitting) meeting – further discussion with the Chair & deputy nearer the time as the agenda is issued is suggested.</p> <p>Next meeting – Monday 29th November 2021 @ 8.30am This is planned as a possible virtual teams meeting.</p> <p>Next Schools Forum meetings are Thursday 7th October (via Microsoft Teams) and then Thursday 9th December 2021 @ 1.30pm planned as a hybrid/face to face meeting (subject to current guidance). Papers will be circulated by Lisa Pullin Wednesday 29th September and 1st December 2021 for those meetings.</p>	MT