

AGENDA

Meeting: Schools Forum

Place: Conference Suite, 1st Floor, County Hall, Trowbridge

Date: Tuesday 5 December 2023

Time: 1.30 pm

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

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

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PART I

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

1 **Apologies/Substitutions and Changes of Membership**

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

2 **Minutes of the Previous Meeting** (*Pages 7 - 34*)

To approve as a correct record and sign the minutes of the meeting held on 5 October 2023 (copy attached).

3 **Chair's Announcements**

To receive any announcements from the Chair.

4 **Declaration of Interests**

To note any declarations of interests.

5 **Public Participation**

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

Statements

Members of the public who wish to submit a statement in relation to an item on this agenda should submit this electronically to the Officer named on the agenda **no later than 5pm on Friday 1 December 2023** (1 clear working day before the meeting). 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 Tuesday 28 November 2023** to allow a response to be formulated. Questions are limited to a maximum of 2 per person/organisation. A response will be given as either a direct oral answer or a written reply. Questions must not require the disclosure of confidential information. The Chair's ruling on rejection of a question is final.

6 **Updates from Working Groups (Pages 35 - 38)**

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

- Early Years Reference Group – 29 September 2023 (*attached*)
- Joint meeting of the School Funding Working Group and SEN Working Group – 27 November 2023 (*to follow*)

7 **National Funding Formulae for Schools and High Needs - 2024-25 (Pages 39 - 46)**

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks 'in principle' decisions from members of Schools Forum with regards to the Wiltshire funding formula for the 2024-25 year.

8 **Allocation of Funding for Pupil Growth 2024-25 (Pages 47 - 52)**

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks Schools Forum agreement on the methodology for allocating funding for pupil growth from the school's block growth fund in 2024-25.

9 **Dedicated Schools Grant Consultations 2024-25 (Pages 53 - 60)**

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to update Schools Forum with the results of the recent Autumn consultations relating to:

- De-delegation of central services - Maintained Schools only
- De-delegation in support of former LAMB grant – Maintained Schools only
- Transfer of funds from Schools Block to High Needs Block – all schools.

The survey results will help to inform Schools Forum decisions for setting the budgets for the 2024-25 financial year.

10 **Additional Support for Maintained Schools in Financial Difficulty in 2023-24 (Pages 61 - 66)**

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to set out the details behind the additional support funding for maintained schools in the 2023-24 year and seeks agreement from Schools Forum for the distribution of the supporting funding to maintained schools currently in a financial deficit.

11 **Update on Safety Valve Plan**

Liz Williams (High Needs Block Sustainability Finance Lead) will present the draft Safety Valve plan for Wiltshire Council prior to submission to the Department for Education - the supporting papers are *to follow*.

12 **Confirmation of Dates for Future Meetings**

To confirm the dates of future meetings, as follows:

18 January 2024
14 March 2024
27 June 2024
10 October 2024
12 December 2024.

13 **Urgent Items**

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

PART II

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

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Schools Forum

MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 5 OCTOBER 2023 AT ONLINE MEETING - VIA MICROSOFT TEAMS.

Present:

Nikki Barnett, Aileen Bates, Lyssy Bolton, Angela Brennan, Andy Bridewell, Rebecca Carson, Michele Chilcott, Stella Fowler, John Hawkins, Cllr Ross Henning, Graham Nagel-Smith, Nick Norgrove, Lisa Percy (Chair), John Read, Graham Shore (Vice-Chair), Trudy Srawley, Mike Thomas and Catriona Williamson

Also Present:

Cllr Jane Davies, Cllr Dominic Muns and Cllr Suzanne Wickham

Grant Davis (Schools Strategic Financial Support Manager)
Ellen Ghey (Democratic Services Officer)
Cate Mullen (Head of Inclusion & SEND)
Lisa Pullin (Democratic Services Officer)
Ben Stevens (Sustainability Strategic Lead – High Needs Block)
Marie Taylor (Head of Finance – Children and Education)
Liz Williams (Finance Lead – High Needs Block Sustainability)

30 **Election of Chair**

Nominations were sought for a Chair for the forthcoming year. On the nomination of Graham Shore, seconded by Michele Chilcott, it was:

Resolved:

The Schools Forum elected Lisa Percy as Chair of the Schools Forum for the forthcoming year 2023-24.

31 **Election of Vice Chair**

Nominations were sought for a Vice-Chair for the forthcoming year. On the nomination of Lisa Percy, seconded by Catriona Williamson, it was:

Resolved:

The Schools Forum elected Graham Shore as Vice-Chair of the Schools Forum for the forthcoming year 2023-24.

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

Apologies for absence from Members were received from:

- Helen Carpenter
- Georgina Keily-Theobald
- Emma Osmund
- Giles Pugh
- Ros Sutton
- David Whewell

Further apologies were noted from:

- Helean Hughes (Co-Director – Education & Skills)
- Richard Hanks (Co-Director – Education & Skills)
- Lucy Townsend (Corporate Director – People)

The Chair announced the following Membership changes:

- It was confirmed that Helen Carpenter had taken over from Ian Tucker as the Chair of WASHH and the Secondary Academy Representative.
- It was confirmed that Mike Thomas had taken over from Jon Hamp as the Special School Academy Representative.

The Chair welcomed the new Members and thanked Ian Tucker and Jon Hamp for their contributions while a part of the Schools Forum.

33 **Minutes of the Previous Meeting**

The minutes of the previous meeting held on 8 June 2023 were presented for consideration.

Following which, it was:

Resolved

The Schools Forum approved and signed the minutes of the previous meeting held on 8 June 2023 as a true and correct record.

34 **Chair's Announcements**

The Chair made the following announcements:

- Liz Williams was welcomed back to the Schools Forum after rejoining Wiltshire Council as the Finance Lead – High Needs Block Sustainability.
- Depending on the length of the meeting, a comfort break may be had at an appropriate time.

35 **Declaration of Interests**

There were no declarations of interest.

36 **Public Participation**

There were no questions or statements submitted.

37 **Updates from Working Groups**

The Chair raised the update from the last joint meeting of the School Funding and SEN Working Group held on 25 September 2023. There being no questions or comments on the updates, it was then:

Resolved:

The Schools Forum noted the update from the last joint meeting of the School Funding and SEN Working Group held on 25 September 2023.

38 **Wiltshire Schools Forum Proportionality, Membership and Terms of Reference**

A report on the Wiltshire Schools Forum Proportionality, Membership and Terms of Reference was presented by Lisa Pullin, Democratic Services Officer.

Members were reminded that the Membership of the Schools Forum was reviewed on an annual basis, with all those who make appointments of named representatives being asked to confirm those persons for the ensuing academic year. As such, it was confirmed that on 25 August 2023, officers had conducted a review of the balance of Membership between Maintained Primary Schools, Maintained Secondary Schools and Academies, and Special School Members. This showed that the current Membership would not need to be amended as it reflected the current breakdown of the total numbers on roll in schools as at the October 2022 census and updated for Academy conversions.

Furthermore, the Terms of Reference of Schools Forum were last reviewed by the 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 were no changes to the proportionality, it was proposed that no changes to the Terms of Reference were required.

Following which, it was:

Resolved:

- a) **The Schools Forum noted that the proportionality of the Forum had been reviewed and that no changes were recommended.**
- b) **The Schools Forum noted that no changes to the Terms of Reference as at 4 January 2023 were recommended.**
- c) **The Schools Forum noted the current Membership details of the Forum.**

d) The Schools Forum recommended that any vacancies for Schools Forum be appointed to.

39 **School Revenue Surplus and Deficit Balances 2022-23**

Grant Davis, Schools Strategic Financial Support Manager, referred to the report which presented the position of revenue balances for Wiltshire maintained schools as at 31 March 2023, and identified those in surplus and deficit. The following was highlighted:

- The net surplus balances for the financial year 2022/23 were confirmed as £12.2m with 104 schools holding surplus balances of £14.4m and 12 schools in deficit to a value of £2.2m.
- When comparing the figures to those of last year, it was confirmed that there had been a slight reduction in the net surplus balances of £1.1m. However, the number of Local Authority (LA) maintained schools had decreased from 126 to 123 over the period of 31 March 2022 to 31 March 2023. Furthermore, it was highlighted that the data did not include those schools which had converted to academies during the financial year.
- Paragraph 5 of the report was highlighted which presented a breakdown of the movement in net revenue balances over the last 3 financial years and showed that the balances were generally coming down across Primary, Secondary, and Special schools over that period.
- Appendix 1 of the report was then highlighted which showed a breakdown of all individual maintained schools' revenue surplus and deficit balances. It was noted that there were two trigger points in which the Department for Education (DfE) could request further information from LAs and these were detailed in Paragraph 8 of the report.
- Appendix 2 of the report was then raised which analysed the 2022/23 maintained schools' revenue balances to categorise those that were in surplus and above 15% of their school budget share, those in surplus but below 15% of their school budget share, and those in deficit. As such, it was highlighted that there were 40 schools in the first category, 64 in the second, and 12 in the third, giving an indicative position across the maintained schools sector.
- Appendix 3 of the report was then raised, and it was noted that an investigation could be triggered by the DfE as per Paragraph 8a of the report, as there were 13 schools that had held a revenue balance of 15% or more of their school budget share over the past 5 years.
- Appendix 4 of the report was then raised, and it was noted that an investigation could be triggered by the DfE as per Paragraph 8b of the report, as there were 4 schools that had held deficit balances of more than 2.5% and £10,000 over the past 4 years.
- Paragraphs 12 through 16 of the report were then noted as the key points for the Schools Forum to consider, with Paragraph 17 detailing the indicative position for 2023-24.

In response to a question, it was explained that Abbeyfield School was in deficit which had built up due to tight school funding and investments made to accommodate an anticipated growth in pupil numbers which did not come to fruition over 5 years ago. Furthermore, it was highlighted that Abbeyfield School was a Private Finance Initiative (PFI) school which led to non-controllable higher costs in rental, facilities management, and day-to-day operations. Therefore, officers commended the hard work undertaken by the school's staff team in reducing the deficit figure.

Following which, it was:

Resolved:

The Schools Forum noted the report.

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

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

- It was noted that an overspend of £1.971m across all four Blocks of the Dedicated Schools Grant (DSG) was forecast against the overall schools budget, with the main driver for the variance being the ongoing pressures on the High Needs Block (HNB). This was noted as being in addition to the planned DSG deficit reserve transfer of £16.648m.
- Paragraphs 4 to 6 of the report, including Table 1, was explained and it was noted that the strategy deployed by officers allowed for tighter budget monitoring and to hold more budget managers to account.
- Each of the individual Blocks were then raised, in the order that they were detailed in the report.
- It was noted that the Early Years Block budgets were projected to underspend by £0.157m, with the budgets having been decreased by the planned transfer to the DSG reserve. Thus, facilitating improved budget monitoring and reflecting the Department for Education's (DfE) post-year adjustment of the variance. Paragraphs 8 to 9 of the report were then detailed, and it was highlighted that the post-year adjustment to the 2022/23 financial year resulted in an uplift of £35,133, and, the in-year adjustment for the 2023/24 financial year had resulted in an uplift of £77,322, both of which were welcomed by officers.
- The table in Paragraph 8 was highlighted, with officers drawing attention to the Inclusion Support Funding (ISF). It was explained that officers had changed the way in which ISF had been allocated to better reflect children's needs with more children getting a lower-level grant.

- The HNB budgets were then detailed, and it was noted that the projected overspend was £2.211m, with the budgets being increased by the planned drawdown from the DSG reserve to facilitate improved budget monitoring, target setting, and methods of measuring success in respect of recovery planning.
- Paragraphs 12 to 13, including both tables, were then explained.
- The DSG reserve and management plan were detailed as per Paragraphs 15 to 18 of the report.

Following which, it was:

Resolved:

The Schools Forum noted the forecast budget monitoring position including the balance on the Dedicated Schools Grant reserve at the end of August 2023, together with the update on the High Needs Block recovery plan and Safety Valve programme.

41 **Update on High Needs Sustainability: the Safety Valve Programme**

Liz Williams, Finance Lead – High Needs Block Sustainability, presented an introduction to the Safety Valve Programme; the slides of which can be found attached to these minutes. The following was highlighted:

- It was explained that the previous meeting of the Schools Forum had received an update on the Delivering Better Value (DBV) in SEND Programme. In the time since the last meeting, Members were informed that Wiltshire Council had received an invitation to join the Department of Education's (DfE) Safety Valve Programme which was a different level of intervention from the DBV Programme. As such, work on the DBV Programme had now ceased in place of the Safety Valve Programme.
- Members were given context behind the High Needs Block (HNB) from a national perspective, as per Slide 1 of the presentation.
- Slide 2 provided a Wiltshire Council specific perspective in respect of the Dedicated Schools Grant (DSG) deficit and linked to the figures as detailed within the previous Agenda Item, Dedicated Schools Budget – Budget Monitoring 2023-24. It was noted that Wiltshire Council's cumulative DSG deficit of £35.2m at the end of the 2022/23 financial year had triggered the DfE to look into incorporating Wiltshire into the Safety Valve Programme.
- Slide 3 went into the reasons for deficit, analysing the expenditure and activity against the HNB, and how it correlated with the data gleaned through the DBV High Impact Analysis.
- Slide 4 went through the current DSG Management Plan and it was noted that the table in the slide was the same as that in the Appendix of the previous Agenda Item's report. It was further noted that the figures had been updated since the previous meeting of the Schools Forum to

bring the income assumptions in line with the indicative settlement for the HNB for the next financial year and future years. Furthermore, forecast activity had also been updated in line with current growth trends and mitigations such as place sufficiency and alternative provisions, to provide a more informed forecast of activity within the plan. However, officers acknowledged that further improvements and work was needed to continue reducing the mitigated deficit for the future.

- The differences between the two DfE Intervention Programmes that could support Councils in deficit (DBV and Safety Valve) were detailed as per Slide 5.
- Slides 6 and 7 detailed what the DfE would commit to within the Safety Valve, and what the Council needed to commit to during the process.
- Slide 8 displayed a graphic showing Wiltshire Council's approach to the Safety Valve Programme to transform the High Needs System and Slide 9 detailed the priority workstreams for High Needs Sustainability that would feed into the Safety Valve work.
- Slide 10 posed some 'asks' for the Schools Forum:
 - For two nominees from the Forum to be a part of the Programme Board to represent schools in Wiltshire and to consider creating a smaller Task and Finish Group to focus on the Safety Valve Programme from a schooling perspective to help provide assurance to the wider Board.
 - Some suggestions to support the planned half-day co-design workshop in November for Schools Forum Members.
 - To fill in the survey as detailed on the slide and to share it with colleagues.

In response to a question on Slide 10, it was confirmed that Governors were also welcome to be involved in the Programme Board. Furthermore, officers confirmed that one purpose of including School Forum Members in the workshops and Programme Board was to understand the root causes of the issues driving the overspend within the HNB in Wiltshire and to aid in finding solutions that worked for Wiltshire, by drawing on Members' professional knowledge, expertise, and experiences.

The Chair suggested that all Members who wished to be part of the programme moving forward, contact the Democratic Services Officer, Lisa Pullin.

Following which, it was:

Resolved:

The Schools Forum noted the update on the Safety Valve Programme.

42 **Early Years Operational and Funding Update**

Marie Taylor, Head of Finance – Children and Education, referred to the report which presented a series of Department for Education (DfE) Early Years Publications issued in July 2023. The following was highlighted:

Spring Budget 2023 Childcare Expansion

- Paragraphs 2 to 9 of the report were detailed, the highlights of which being:
 - Funded childcare hours would be extended to children of eligible working parents in England from nine months old to support increased parental engagement in the labour market.
 - The measures would expand the existing system by offering a phased rollout by September 2025 of up to 30 funded hours per week over 38 weeks of the year to children aged nine months and over whose parents met the same income eligibility criteria as applied to the existing 30 hours entitlement for three and four-year olds.
 - The changes were aimed to increase flexibility for providers and the availability of childcare provisions for parents by changing staff-to-child ratios for 2-year-olds and allowing childminders to care for more than the specified amount of three young children, subject to conditions.
 - By the 2027/28 financial year, the national investment was due to rise to £4.1m from £1.74m for the 2024/25 financial year.
 - A new national wraparound childcare pathfinder scheme was being launched with the aim of allowing all parents of primary-aged children in England to access care in schools from 8am – 6pm. £289m in start-up funding would be invested nationally to enable schools and Local Authorities (LAs) to test options of increasing wraparound childcare, with the national rollout due over the 2024-25 and 2025-26 academic years.

Early Years Supplementary Grant 2023-24

- Paragraphs 10 to 13 of the report were detailed, the highlights of which being:
 - As the expansion plans were to be rolled out from September 2023, a separate mechanism of funding was put in place to facilitate a timely rollout.
 - Wiltshire's allocation of the £204m supplementary grant funding to LAs for the 2023-24 financial year was £1.642m and would provide supplementary funding for all existing early years funding streams as listed in Paragraph 11.
 - The supplementary funding was separate to the funding provided through the Early Years Block of the DSG for the existing entitlements in the 2023-24 financial year.

- Wiltshire was one of the 42 LAs for whom there was a reduction in the 2024-25 illustrative hourly rate with a £0.26 reduction (3.4%) per hour from the effective combined rate.

Early Years Funding – Extension of the Entitlements – Government Consultation

- Paragraphs 14 to 19 of the report were detailed, the highlights of which being:
 - The DfE launched a consultation that ran from 21 July to 8 September 2023 requesting views from LAs, early years providers, and sector representative bodies on a number of proposals regarding the approach to funding for the early years entitlements for 2-year-olds and under from 2024-25, as listed in the report.
 - Wiltshire responded to the consultation and shared the response with the Early Years Sector and Reference Group.
 - Appendix 1 of the report detailed Wiltshire’s responses.

Following which, it was:

Resolved:

The Schools Forum noted the three July 2023 publications from the Department of Education and considered the implications for Wiltshire.

43 **National Funding Formulae for Schools and High Needs - 2024-25**

Grant Davis, Schools Strategic Financial Support Manager, referred to the report which outlined the Department for Education (DfE) funding proposals for schools and high needs in 2024-25, which were published in July 2023. It was emphasised that the report was being presented to draw the Forum’s attention to the proposals rather than for consultation and decision making, as all funding decisions related to the 2024-25 year would be taken following the announcement of the 2024-25 funding settlement. The following was then highlighted:

- Paragraphs 3 to 7 of the report provided some background to the report with regard to the Government’s pledges to increase core school funding in 2023-24 and 2024-25 following the additional school funding awarded during 2020-21 and 2022-23.
- Paragraphs 8 to 15 detailed the funding proposals for 2024-25 and it was noted that the 2024-25 year would be the second transition towards the direct schools National Funding Formula (NFF). It was highlighted that Wiltshire’s local school formula already mirrored the NFF and so any future tightening of the formula would have a minimal impact upon Wiltshire schools.

- The table in Paragraph 11 was highlighted as showing the indicative Dedicated Schools Grant (DSG) Block allocations, based upon October 2022 census data. However, it was noted that the Early Years Block figures had been replicated from the 2023-24 allocation to provide a view of the overall quantum of funding for 2024-25, as the Block was still subject to further work by the DfE and in-year changes.
- Paragraph 12 listed the changes to the 2024-25 funding formula from the 2023-24 formula, and Appendix 1 highlighted some of the subtle key changes to the funding criteria of the NFF.
- Officers confirmed that Schools Forum Members would continue to retain their role in determining the school funding allocation methodology. However, Members were reminded that the Government had confirmed its intention to move to a single direct NFF by 2027-28 and would therefore have the ability to determine every school's budget centrally.
- Paragraph 16 set out a table detailing the NFF funding values for schools for the 2024-25 year.
- Members were informed that a number of funding decisions that the Forum had made for the 2023-24 year would have to be taken for the 2024-25 year, as listed in Paragraph 17 of the report.
- The budget setting process for 2024-25 was then detailed, with the calculation shown in Paragraph 21 of the report.
- Growth Funding, Initial Modelling, De-Delegation, and Notional SEN were then explained, as per Paragraphs 22 to 27 of the report. The highlights of which being:
 - The level of Growth Funding required, and the size of the Growth Fund for 2024-25, would be determined later in the year with confirmation of the Growth Funding criteria, to ensure compliance with the NFF criteria.
 - Initial modelling of the Schools Block demonstrated that the NFF was affordable and therefore the full NFF could be implemented, based on the October 2022 census data.
 - Schools Forum would take any de-delegation decisions on behalf of maintained schools, based upon the results of the consultation responses. Furthermore, maintained schools voting Members had agreed that de-delegation of services would continue as it had in 2022-23 and previous years, and included the de-delegation of funding to support School Improvement Services.
 - Mainstream schools and Academies would continue to receive the Notional SEN budget and would be expected to use this budget to meet the needs of pupils with low cost, high incidence SEN and to contribute the first £6,000 of provision for all pupils with high needs.
- Appendix 1 of the report was then highlighted, and officers explained in further detail: Exceptional Circumstances, Growth Funding, Falling Rolls Funding, Notional SEN, and Split Site Funding, as per the relevant Paragraphs within the Appendix.

- It was then confirmed that a Disapplication Request had been submitted to the DfE, as in previous years, under funding for 'Exceptional Circumstances'. The Disapplication relates to those schools that don't have facilities for holding whole school events and were required to hire village halls, playing fields and so forth. Whilst the DfE had set the threshold of the rental being greater than 1% of the schools budget, it was confirmed that Wiltshire would request setting the threshold at 0.75% of the schools budget share.
- Members were then asked to consider the following:
 - a) Under the funding guidance for 2023-24, the Schools Forum would continue to be able to transfer up to 0.5% of their Schools Block allocation to other Blocks of the Dedicated Schools Grant if they so wished.
 - b) As Wiltshire already mirrored the National Funding Formula (NFF), alongside over 66% of Local Authorities in England, a decision regarding continuing to follow the NFF would need to be confirmed, however Members were informed that no impact from the tightening requirements was likely to be felt in Wiltshire if that decision was agreed.

Following which, it was:

Resolved:

The Schools Forum noted the content of the report.

Post meeting note:

Following the meeting, on the 6 October 2023, the Department for Education announced that an unforeseen error had occurred in the calculation of 'School' funding for the 2024-25 year. Incorrect pupil forecasts had been used to calculate the school funding rates and as a result, Wiltshire would see a reduction in the Schools Block funding of £3.3m; approximately 1% of the Schools Block. Full details and a revised report will therefore be presented at the next meeting of the Schools Forum on 5 December 2023. A letter from the Permanent Secretary to the Chair of the Education Select Committee confirming this information is attached to these minutes.

Attachment – Letter

44 **Confirmation of Dates for Future Meetings**

The date of the next meeting was confirmed as Tuesday 5 December 2023 at 1.30pm and was planned to be held in person at County Hall, Trowbridge.

Future meeting dates were confirmed as below:

18 January 2024 – 1.30pm
14 March 2024 – 1.30pm
27 June 2024 – 1.30pm
10 October 2024 – 1.30pm

45 **Urgent Items**

There were no urgent items.

(Duration of meeting: 1.30 - 3.00 pm)

The Officer who has produced these minutes is Ellen Ghey, of Democratic Services,
direct line 01225 718259, e-mail committee@wiltshire.gov.uk

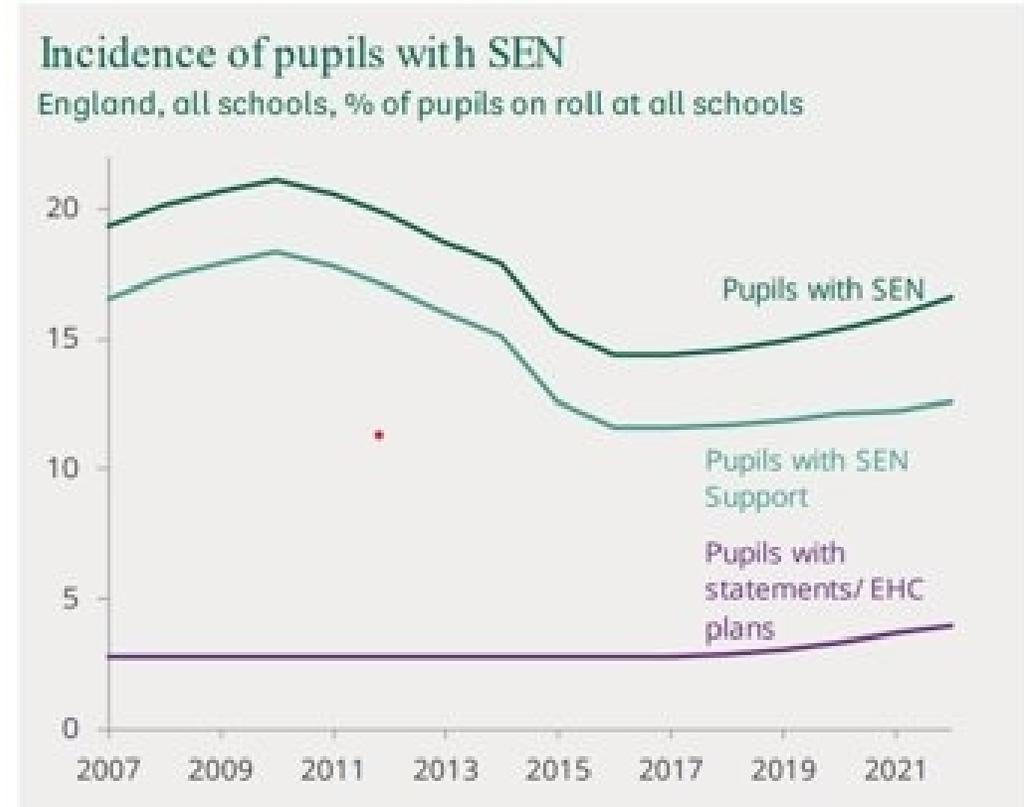
Press enquiries to Communications, direct line 01225 713114 or email
communications@wiltshire.gov.uk

Safety Valve – *Wiltshire Approach*

Schools Forum
5 October 2023

Background and Context

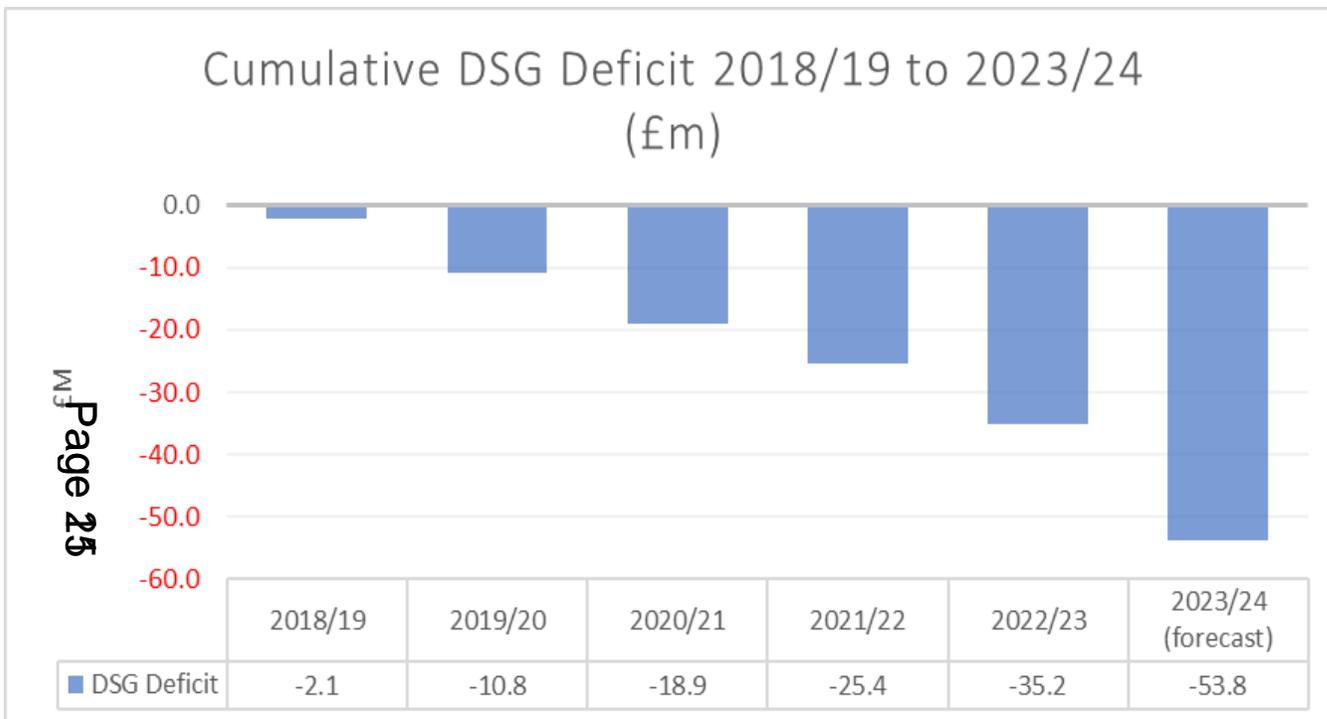
- The High Needs Block, which is specifically to help children and young people who have Special Educational Needs (SEN), is part of the Dedicated Schools Grant (DSG) allocated to the Council.
- Over two thirds of councils in England are overspending against their High Needs Block as demand increases.
- In 2022, ADCS estimated the total deficit across all councils was £2.6bn.
- This growth is down to multiple factors, including a change in assessment criteria and a growth in the number of Educational Health and Care Plans (EHCPs)



Note: As of January in each year.

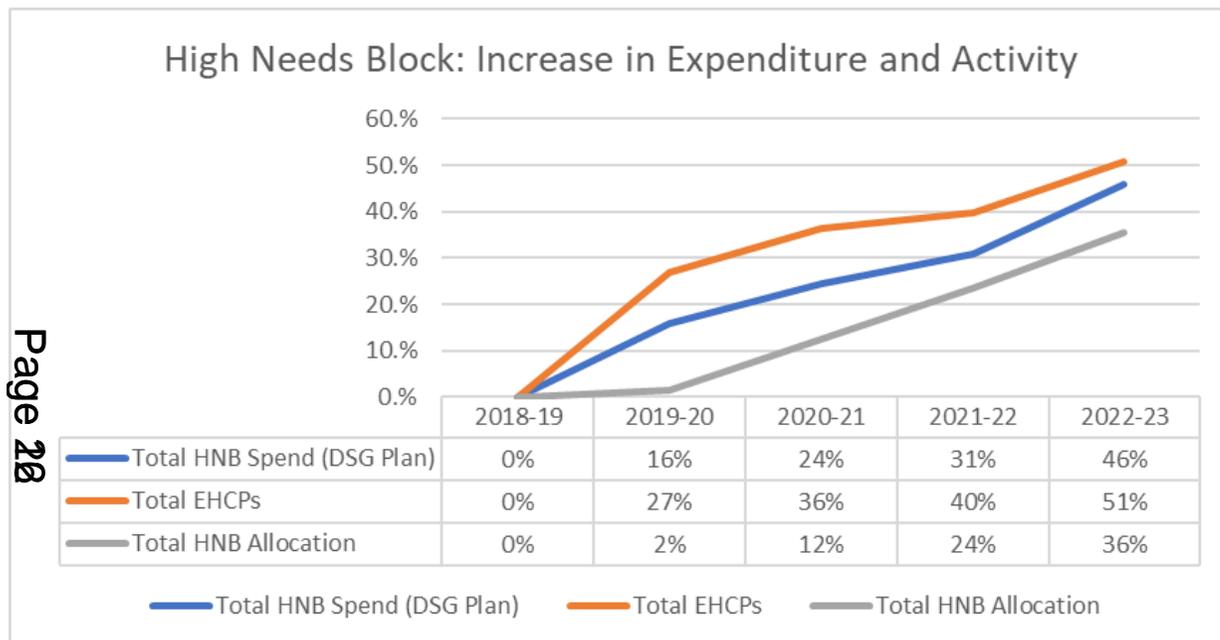
Source: DfE, [Special Educational Needs in England: 2022, June 2022](#); DfE, [Special Educational Needs in England: 2019, July 2019](#) (for all data prior to 2020, Table 1)

Wiltshire DSG Deficit



- At the end of the 2022/23 financial year the Council had a cumulative DSG deficit of £35.2m. This deficit is held on the council’s balance sheet as a negative reserve.
- The updated forecast for the current financial year projects that the deficit will increase to £53.8m by April 2024.
- In recent years, the deficit has been mitigated by an underspend against the Early Years Block meaning that the annual High Needs overspend is higher
- A “statutory override” is currently in place meaning the deficit does not impact on the council’s general fund. This is due to cease at the end of 2025/26, at which point the council will be expected to have set aside sufficient reserves to offset the deficit

Reasons for Deficit: Analysis of Expenditure and Activity



- Total expenditure against the high needs block increased by 46% from 2018-19 to 2022-23
- The number of EHCPs increased by 51% over the same time period.
- Income from the High Needs Block increased by 36% over that period
- This supports the data from the DBV High Impact Analysis that it is caseloads rather than unit cost driving the spend

Data source:
 Expenditure – section 251 outturn returns 2018/19 to 2022/23
 Activity – SEN2 Returns

DSG Management Plan

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Planned DSG position (surplus)/deficit	£10,812	£18,907	£25,409	£35,214	£53,832	£66,011	£79,585	£96,206	£118,501	£145,959	£178,912

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
In year net position deficit / (surplus)											
Schools block	-£218,085	-£2,837,284	-£945,068	-£1,220,601	-£89,668	£0	£0	£0	£0	£0	£0
Central schools services block	-£262,973	-£67,651	£169,731	-£292,731	£6,085	£0	£0	£0	£0	£0	£0
Early years block	£542,741	-£505,787	-£2,445,638	-£2,180,601	-£2,406,555	-£123,892	£0	£0	£0	£0	£0
High needs block	£8,470,047	£11,505,753	£9,722,968	£13,499,064	£21,108,718	£12,302,108	£13,573,967	£16,621,750	£22,294,453	£27,457,919	£32,953,580
Total net	£8,531,730	£8,095,031	£6,501,993	£9,805,131	£18,618,580	£12,178,216	£13,573,967	£16,621,750	£22,294,453	£27,457,919	£32,953,580

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Other											
Council contribution (negative)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Add brought forward deficit / (surplus) (net)	£2,279,880	£10,811,610	£18,906,641	£25,408,634	£35,213,765	£53,832,345	£66,010,562	£79,584,529	£96,206,279	£118,500,732	£145,958,651
Planned year end position	£10,811,610	£18,906,641	£25,408,634	£35,213,765	£53,832,345	£66,010,562	£79,584,529	£96,206,279	£118,500,732	£145,958,651	£178,912,231

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- The updated draft plan shows that by April 2030 the mitigated deficit could reach **£178.9m**
- Forecast activity has been revised during August and is based on the current growth trends and mitigations. Expenditure reflects the planned mitigations and latest forecast for this year.
- The mitigations currently included in the plan are based on planned increases in places across Wiltshire's special school and resource base provision
- There are less well-defined mitigations in the plan relating to demand management and support for mainstream inclusion
- The DfE has 2 main programmes in place to support councils to achieve sustainable high needs systems and reduce DSG deficits

DfE Intervention Programmes to Support Councils in Deficit

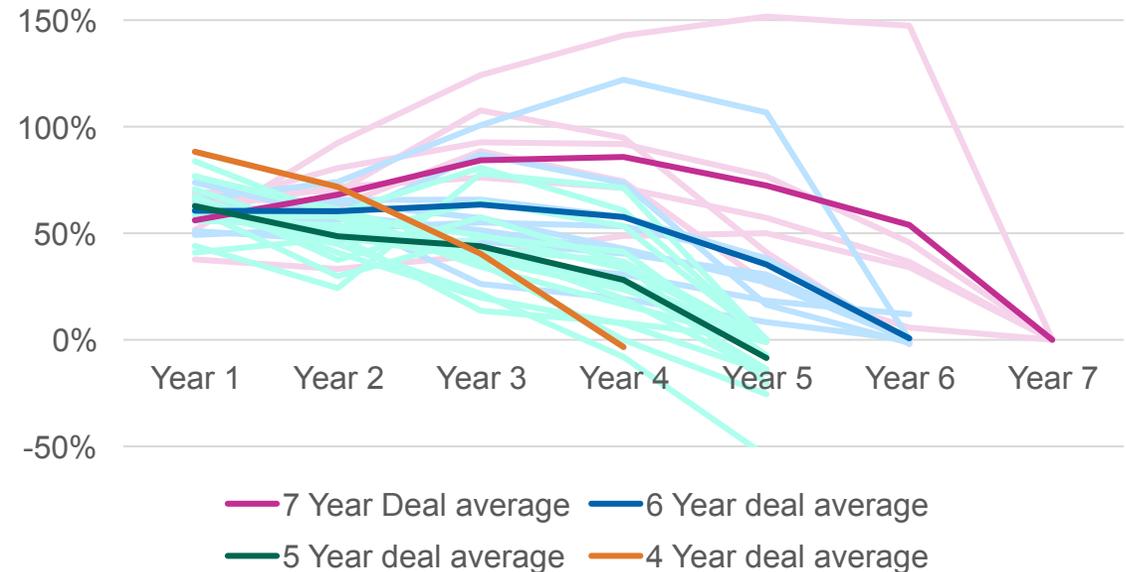
Delivering Better Value in SEND	Safety Valve
Support from Newton (Europe) Ltd consultants to analyse data and produce initial forecasts (Module 1) – August 2023	Initial challenge from CIPFA and DfE to review current forecasts and planned mitigations - Existing plan to be submitted by end of August for review
Module 2 – Root cause diagnostic to identify and quantify highest impact actions - September 2023	Work to develop revised DSG Management Plan to achieve in year financial balance over 5-7 year period
Module 3 – implementation planning – Oct to December 2023. Submit plan December	New draft plan to be submitted by 15 th December, new final plan by 12 th January, to be signed by SoS and Wiltshire in Feb/March
Outcome – application for £1m grant to support implementation of the plan	Outcome – 5-7 year agreement signed off with the DfE for council to achieve in year financial balance and DfE to provide additional DSG to “write off” legacy deficit
Focus on improved outcomes and financial sustainability	Focus on deficit reduction and improved outcomes

Safety Valve Deals – Department of Education

- Deals will provide additional DSG as extra revenue to pay down the DSG deficit and support implementation. (a review of other SV deals suggests contributions average (median) around 10% of total DSG)
- Capital investment can be made available as part of these deals if the DfE is satisfied it is integral to the plan
- Average payment in year 1 is 40-45% of the DSG deficit
- Realistic profiling of deficit allows time before impact of the interventions is felt

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Safety Valve Deals – Net DSG Deficit as a % of the original



Safety Valve Deals – Wiltshire Council

- Wiltshire Council will commit to delivering a plan that will bring us back to a balanced position in year over the period of the deal.
- We will agree to the intense scrutiny and monitoring that will follow the deal.
- No expectation that we commit our own money if balance can be achieved and DfE maximum contribution not exceeded

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Our approach in Wiltshire



Safety Valve is about embracing transformation



Wiltshire Council and our values won't change.



Co-design is key to our approach



Priority Workstreams for High Needs Sustainability

- 1 Improving support pre-EHCP to increase parental confidence and mainstream inclusion
- 2 Preventing the need for escalation of support by ensuring the right support, first time
- 3 Ensuring value for money and the right contributions from partners
- 4 Enhance transition pathways to provide a range of opportunities to prepare for adulthood
- 5 Developing better communication and processes to change the culture in our SEND system

3 asks for Schools Forum...

- Our Programme Board meets every 4 weeks on a Thursday morning – we would like to include two nominees from Schools Forum to provide that school voice. We would also welcome a Task and Finish Group to focus on this more regularly and provide assurance to the wider group
- We are planning a half-day co-design workshop in November for School's Forum Members – we would welcome suggestions and support in making that successful.
- There is a survey currently live that will help us collect views on how the system is working from education and health professionals. We would encourage you to fill the survey in, and to share it with colleagues. The survey can be accessed through <https://surveys.wiltshire.gov.uk/s/g498uz> or through this QR code:



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Permanent Secretary

Sanctuary Buildings 20 Great Smith Street Westminster London SW1P 3BT
tel: 0207 340 7414 permanent.secretary@education.gov.uk

Robin Walker MP
Chair, Education Select Committee
SENT VIA EMAIL

6 October 2023

Dear Robin,

National Funding Formula Update

I am writing to inform you that we will be updating the schools national funding formula (NFF) for 2024-25 later this afternoon.

We published the schools NFF for 2024-25 in July. However, we have uncovered an error made by DfE officials during the initial calculations of the NFF. Specifically, there was an error processing forecast pupil numbers, which means that the overall cost of the Core Schools Budget would be 0.62% greater than allocated. We will therefore be issuing new NFF allocations to correct that error while continuing to deliver, in full, the £59.6bn Core Schools Budget that has been promised.

I apologise for this error. The Secretary of State has asked me to conduct a formal review of the quality assurance process surrounding the calculation of the NFF, with independent scrutiny. Improvements have already been identified to ensure similar mistakes are not repeated in the future.

The recalculation of funding does not affect the total amount we plan to spend in the Core Schools Budget in 2024-25 - which includes funding for mainstream schools, and funding for high needs. It will remain at £59.6bn in 2024-25, the highest ever in real terms per pupil. This is a percentage increase from 2023-24 of 3.2%, and will properly fund the teacher pay increase agreed in 2023.

The recalculated funding is at record levels, at an average of £5,300 per primary school pupil and £6,830 per secondary school pupil in 2024-25, up from £5,200 and £6,720 respectively in 2023-24. The 2024-25 high needs NFF allocations (which fund provision for children with complex SEND) are unaffected, as are other funding streams outside the NFF, including the Teachers' Pay Additional Grant announced in the summer.

Schools have not yet received their 2024-25 funding – so the correction of this error does not mean adjusting any funding that schools have already received. Likewise, the error will not impact on the publication of the Dedicated Schools Grant (DSG) in December, or when schools will receive their final allocations for 2024-25.

Nevertheless, we recognise that the correction of this error will be difficult for local authorities and frustrating for some school leaders, which is why the Department has worked as quickly as possible to rectify the error. We will work closely with school stakeholders, including unions, to communicate this change and support schools and local authorities.

The documents which will be updated and replaced with new versions today are:

- The policy document for the 2024-25 NFF, which is available on: [National funding formula for schools and high needs - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/policies/national-funding-formula-for-schools-and-high-needs)
- The “national funding formula: summary table”, and the “impact of the schools NFF” tables, published on: [National funding formula tables for schools and high needs: 2024 to 2025 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/tables/national-funding-formula-tables-for-schools-and-high-needs-2024-to-2025)

I expect you will have further questions on the re-publication of the NFF once it has been issued, and look forward to discussing them with you in due course.

Again, I would want to express my sincere apologies that this error has occurred, and reassure you that rigorous measures are being put in place to ensure that it will not be repeated.

Yours sincerely,

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**SUSAN ACLAND-HOOD
PERMANENT SECRETARY**



Permanent Secretary

Sanctuary Buildings 20 Great Smith Street Westminster London SW1P 3BT
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Yours sincerely,

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**SUSAN ACLAND-HOOD
PERMANENT SECRETARY**

Early Years Reference Group Meeting Friday 29 September 2023

1. Welcome and introductions.

Emma Osmund – Cygnets Preschool, Bratton/Westbury (Chair)
Emma Egan – Ramsbury Preschool
Kirsty Merrifield – Puddleducks, Salisbury
Karen Venner – ABC Melksham
Charlotte Forrester – Look out Monkton Farleigh
Lucy-Anne Bryant – Commissioning Manager (Wiltshire Council)
Jane Boulton – Springboard, Chippenham
Debbie Muir – Warminster Prep
Jacqui Day – Bright Stars, Westbury
Lyssy Bolton - The Mead Community Primary, Trowbridge
Marie Taylor – Head of Finance Children’s and Education (Wiltshire Council)
Emma Cooke – Early Years Service Manager (Wiltshire Council)
Emily Wood – Senior Commissioner (Wiltshire Council) - Notes

2. **Apologies** Jenny Harvey – EYE Team (Wiltshire Council), Sarah Hawkins – TNB Garrison

3. **Minutes of last meeting (31 March 2023)** – agreed as true record

4. Matters arising

EY Conference – Emma has down Tamsin Grimmer as a suggested speaker.

ACTION: No action

5. Budget monitoring position August 2023 (Marie Taylor)

Marie’s presentation was shared ahead of next week’s Schools Forum.

Inclusion Support Funding – Emma Cooke reported how her team now has better data to budget. Central expenditure is under because of vacancies.

Update on the DSG Reserve – (held in the council’s balance sheet and cashflowed by the Council) In Wiltshire we’re in deficit (prediction is a 54M deficient by March 24). At SF on Dec 5th – large presentation will be given on how we, alongside two thirds of all Local Authorities, are in deficit. DfE – Safety Value project hopes to eliminate High Needs overspend.

ACTION: No action

6. Early Years Supplementary Grant 2023/2024 and the 2 year old hourly rate (Marie Taylor)

Indicative EY funding rates for 2024/25 have been received from the DfE. The 2-year-old rate is 26p lower than the combined base rate plus Supplementary Grant amount now awarded for the remainder of 2023/24. 42 LA’s are in this concerning position of potentially seeing a drop in funding rates. Communications have been given to all providers to alert them to this. Our response to the DfE’s consultation (held over the summer) included our concerns of this potential drop in funding.

Our funding allocation is normally finalised by the DfE in last week of the Autumn term – MT calculates proposed rate over Christmas and shares this with EYRG in new year (2nd week in January).

Charlotte: normally charges £8/hr for extra hours.

Karen: asked “are we presuming no U-turns will be made on the intention to roll out the expansion to entitlements?”

No. The Local Authority meets monthly with the DfE, no U-turns are expected in policy. We've also raised staff recruitment and retention as large problems facing the county – apparently a national campaign is to be launched in January.

Charlotte: asked “is there sufficient capacity to take on these additional children?” We're aware that many spaces not being offered because there are insufficient staff to operate them. New places will be for younger children, this is challenge as the facilities will be different to offering places for 3 & 4-year-olds. We're hoping for capital funding to assist with developing new places.

Jackie: Settings want to provide high quality provision, but they are not getting the calibre of staff required. Skilled and knowledgeable practitioners are missing. Could Health Visitors be encouraged to prompt parents to apply for childcare early?

Kirsty: She's experienced that Health Visitors in her patch are at a crisis point, they are just firefighting and using bank staff. Puddleduck staff are aging and are considering retiring.

Emma Egan: Early Years providers can't compete with retail recruitment offers, people coming forward are not suitably qualified or not childcare qualified at all.

Lyssy: vulnerable families don't understand the importance of applying for places early. More promotion is needed.

ACTION: Lucy-Anne to contact commissioner responsible for the Health Visitor service to request that HVs prompt parents to apply for childcare as soon as possible.

7. Early Years Funding – expansion to Early Years Entitlements and DfE consultation (Emily Wood)

First expansion of entitlements starts April 2024, whereby all working parents of 2-year-olds will qualify for 15 hrs/week. Parents should be able to start creating their code for this in January. Some single parents on low income may already benefit from 2-year-old funding because of their earnings. The expansion of entitlements may affect our take-up of funding for 'vulnerable families'. We will encourage parents in this category to continue to apply through the vulnerable route as the code will last a year as opposed to 3 months.

What's not clear is whether the EYPP and DAF will be extended for the new cohorts of eligible children coming on stream.

Charlotte: concerned about added paperwork when an increase of children come on stream. Additional work to support those parents where English as an additional language.

Lyssy: in parallel to Charlotte's point, there is a concern as the offer is accessed purely digitally.

Kirsty: Having to have two parent declaration forms per child for one financial year is a nuisance.

Karen: Converts parental dec to Word so it's editable and therefore saveable for each year.

Emma Egan: Why is the 30-hr consent form needed when we have the parental dec? Could we have one form per child that stays with the child for the entire time there are the provider?

ACTION: Emily to look at 30 hr consent form/parent dec

8. Wraparound childcare offer (Lucy-Anne Bryant)

Colleagues from Wiltshire Council have been working with the DfE in codesigning documentation in connection to the expansion of wraparound provision. A handbook is to be published later this term – will we have sufficient staff to offer this? We will be asking PVI settings to find out who would like to offer.

Some funding will become available. This can be used to pump-prime new provision where there is insufficient parental demand to make an immediately sustainable provision. Tax Free Childcare funding will be promoted to parents alongside this expansion.

Charlotte: will providers be forced to offer wraparound? No. We will only fund provision where it is needed – we will not jeopardise existing provision.

Lyssy: if a school runs a new provision, how will quality be managed? Significant safeguarding risk for schools, including resource base providers. SEND children and meeting their complex needs will require equality impact assessments. Meeting their needs will be a huge challenge. The Handbook should help answer these questions/concerns.

ACTION: Emma to check with Judith Tinsley regarding the termly Safeguarding report and risk assessments – could wraparound provision be included in this?

9. FACT Operational Board representation (Lucy-Anne Bryant/All)

LAB explained the purpose for FACT. The board is asking for an EY representative, would anyone like to opportunity to join this? The System of Excellence board is also looking at changing our approach to working with children with SEND, they are also keen to have EY mainstream representative – Charlotte volunteers.

ACTION: Emily to inform Helean Hughes that Charlotte would like to participate in the Systems of Excellence working group.

10. Chairperson role moving forwards

Emma Osmund voiced concerns around having the capacity to effectively chair this group and to attend associated meetings. With volunteers now found for the Schools Forum (below) and System of Excellence Board, Emma is happy to continue for the time being.

ACTION: None

11. Schools Forum – Early Years representative (Marie Taylor)

Karen Venner – happy to take on School's Forum as she has had previous experience attending this. Lyssy to also attend.

ACTION: Marie to send Karen details to join next week's meeting

12. Any other business

Tax Free Childcare (TFC) – we will be surveying providers to find out what income streams they have. 15% of Wiltshire parents have an account to make use of TFC, which is higher than the 9% national take-up. What we don't know is how many parents with an account actually make payments from it. We will be using social media to promote the scheme – please look out for posts on our [EY Facebook page](#) and share these.

ACTION: All to look out for Facebook posts on TFC and share.

13. Date of next meeting

Friday 24 November 2023 at 2pm-3:50pm
Monday 15 January 2024 1pm – 2:30pm

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Wiltshire Council

School Funding Working Group – 27 November 2023

Schools Forum - 5 December 2023

National Funding Formulae for Schools and High Needs – 2024-25

Purpose of report

1. To seek 'in principle' decisions from members of Schools Forum with regards to the Wiltshire funding formula for the 2024-25 year.
2. To update members of Schools Forum on the National Funding Formula (NFF) for 2024-25, following the notification received from the Department for Education on the 6 October 2023, of an error made during the NFF calculations.
3. At the Schools Forum meeting on 5 October 2023, the key funding arrangements as published by the DfE in its document '*The national funding formulae for schools and high needs – 2024-25*', were presented. This report will highlight the key changes and impact for Wiltshire schools.
4. Prior to the funding settlement being announced in mid-December, a number of 'in principle' decisions are sought to help with the school budget preparations. Separate papers have been prepared relating to the De-delegation consultation, funding to support the School Improvement services and the transfer of funding from the Schools Block to support the High Needs Block.

Background

5. The 2024-25 year represents another year where the Government has pledged to boost schools funding, with an increase of 1.9% into the overall Schools Block compared to the 2023-24 year.
6. The DfE will allocate school funding based on the National Funding Formula (NFF) to local authorities. The funding is then run through the local funding formula, taking account of Schools Forum decisions to create individual school budgets. The Schools Block of the Dedicated Schools Grant (DSG) had initially been awarded an increase of 2.4% for the core funding factors compared to the 2023-24 year.
7. The 2024-25 year will be another 'soft' year with local Schools' Forum still retaining its role in determining the school funding allocation methodology. The DfE have confirmed their intention to move to a 'hard' national funding formula and are proposing a move to the full hard formula by 2027-28. In the meantime, there will continue to be a tightening towards the full NFF.

Revised Proposals for 2024-25

8. The Permanent Secretary at the DfE wrote to THE Education Select Committee on 6 October 2023 to advise that initial calculations and allocations through the NFF had been overstated. A copy of the letter is attached as **Appendix 1**.
9. An error had occurred when processing estimated pupil numbers and as a result the NFF would not be affordable within the £59.6bn cash envelope awarded to fund the 2024-25 year. As a result, proposed funding allocations will be reduced. The uplift in core funding values will now be 1.4% and not the proposed 2.4%.
10. The impact of this error only impacts the Schools Block. The proposed reduction in funding in Wiltshire's Schools Block is £3.3m or 0.9% of the proposed funding.

Schools Block 2024-25	Amount
Original Allocation – Wiltshire	£366,935,033
Revised Allocation – Wiltshire	£363,622,610
Reduction	-£3,312,423

11. The indicative DSG Block allocations based upon October 2022 census data are detailed below. The funding will be refreshed when the December funding allocations are announced to take account of the updated October 2023 census data. (The Early Years Block figures are simply replicated from the 2023-24 allocation to provide a view of the overall quantum of funding for 2024-25.)

	Schools*	High Needs	Central	Early Years	TOTAL
2023-24	£355,982,301	£69,303,114	£2,600,176	£30,866,919	£458,752,510
2024-25	£363,622,610	£72,967,232	£2,653,884	£30,866,919	£470,110,645
Headline Uplift	£7,640,309	£3,664,118	£53,708	£0	£11,358,135
% Uplift	2.15%	5.29%	2.07%	0.00%	2.48%

* - Net of Growth funding

12. The main formula for the 2024-25 year is broadly similar to the formula for the 2023-24 year however there are some changes, as detailed below.
 - a. Overall, funding through the NFF will increase by 1.9%
 - b. Core pupil-led funding factors and the lump sum to increase by 1.4%
 - c. Free School Meal funding to increase by £10 to £490 per pupil (2.1%)
 - d. The Mainstream Schools Additional Grant funding values will be built into the 2024-25 funding rates
 - e. The 'Minimum per pupil funding level' to increase by 1.4% (inc. MSAG) to.
 - i. £4,610 for Primary
 - ii. £5,995 for Secondary
 - f. A transfer of up to 0.5% of Schools Block funding to the High Needs Block will be permitted, subject to Schools Forum approval
 - g. All NFF factors must be used in the formula
 - h. Setting the Minimum Funding Guarantee between 0.0% and 0.5%
 - i. The revised 2024-25 NFF funding values are detailed in **Appendix 2**

The Minimum Funding Guarantee

13. The 'Minimum Funding Guarantee' (MFG) is a protection mechanism within the funding formula which means that schools are guaranteed a certain amount of per-pupil funding each year. Since the introduction of the NFF, schools have been guaranteed at least the same amount of per-pupil funding, plus 0.5%, year on year. In other words, the NFF has confirmed a minimum uplift of 0.5% in per pupil funding.
14. Unlike previous years where the NFF rate has been mandated at +0.5%, for the 2024-25 formula Schools Forum can set the rate between 0.0% and 0.5%. The last time that Schools Forum had the discretion to set the MFG rate was in 2020-21, where the rate had to be set between 0.5% and 1.84%. Schools Forum agreed to set the rate at 1.84% to protect schools and the cost to the funding formula was £185,685 (0.06% of total Schools Block funding).
15. The MFG is calculated by taking the total School Budget Share and removing any 'school or premises' funding, including Lump Sum, Rates and Sparsity and then dividing the remaining funding by the number of pupils on roll. This then provides the MFG rate per pupil.
16. Setting a positive MFG of 0.5% for 2024-25, would mean uplifting the MFG rate per pupil by 0.5% for 2024-25 and then comparing this to the 2023-24 rate. Should the MFG per pupil rate not automatically have increased (due to uplift in funding factors) by 0.5%, then schools will receive MFG funding to ensure that they receive the MFG 0.5% uplift.
17. Funding through the MFG used to exceed £2.2m in the Wiltshire funding formula, however since moving to the NFF in 2018-19, the total quantum has not exceeded £250,000 and in the 2023-24 formula was £165,610 (0.048% of total Schools Block funding).
18. Setting the MFG at 0.5% would ensure that all schools received a minimum uplift in their per pupil funding of 0.5%, consistent with previous years.

Role of Schools Forum and the Local Authority

19. The government has confirmed its intention to move to a single direct NFF by 2027-28 and to determine every school's budget centrally. For the 2024-25 year, the DfE have confirmed it will be another 'soft' year, with each LA along with its Schools Forum being able to determine its school funding formula, subject to any NFF requirements and constraints.
20. All NFF factors have been mandatory since 2023-24 and the formula for Wiltshire will be presented to Schools Forum when the final allocations have been confirmed in mid-December and then to the LA for political ratification and approval in February 2024.

Key Funding Decisions to be taken by Schools Forum for the 2024-25 year

21. A number of funding decisions need to be taken by Schools Forum for the 2024-25 year including.
- To apply all the NFF factors in full
 - To set the Minimum Funding Guarantee between 0.0% and 0.5%
 - To transfer funding from the Schools Block to High Needs Block

Budget Setting Process 2024-25

22. The timeline for setting the 2024-25 budget is expected to follow.

5 December 2023	Schools Forum agree in principle decisions for funding, de-delegation and block transfers
15 December 2023	DfE issue funding allocations
18 January 2024	Schools Forum confirm and 'sign off' school budgets for the 2024-25 financial year
20 February 2024	School budgets signed off at Full Council meeting
By 28 February 2024	all schools notified of funding for 2024-25

23. In terms of setting the budgets for schools for 2024-25, the amount of funding available for distribution to schools will be calculated as follows.

DSG Schools Block Allocation	£363,622,610
Less: Growth Fund	x,xxx,xxx
Less: Transfer to Other Blocks	x,xxx,xxx
Total available for School Funding	xxx,xxx,xxx

Initial Modelling

24. Initial modelling of the Schools Block demonstrates that the NFF is affordable, based upon the October 2022 census and therefore the full NFF could be implemented.

Proposal

25. Schools Forum to make 'in principle' decisions for the following formula factors to enable school budgets to be prepared ready for the January 2024 meeting.
- To apply all the NFF factors in full
 - To set the Minimum Funding Guarantee between 0.0% and 0.5%, in line with NFF and subject to affordability.

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Appendix 1



Permanent Secretary

Sanctuary Buildings 20 Great Smith Street Westminster London SW1P 3BT
tel: 0207 340 7414 permanent.secretary@education.gov.uk

Robin Walker MP
Chair, Education Select Committee
SENT VIA EMAIL

6 October 2023

Dear Robin,

National Funding Formula Update

I am writing to inform you that we will be updating the schools national funding formula (NFF) for 2024-25 later this afternoon.

We published the schools NFF for 2024-25 in July. However, we have uncovered an error made by DfE officials during the initial calculations of the NFF. Specifically, there was an error processing forecast pupil numbers, which means that the overall cost of the Core Schools Budget would be 0.62% greater than allocated. We will therefore be issuing new NFF allocations to correct that error while continuing to deliver, in full, the £59.6bn Core Schools Budget that has been promised.

I apologise for this error. The Secretary of State has asked me to conduct a formal review of the quality assurance process surrounding the calculation of the NFF, with independent scrutiny. Improvements have already been identified to ensure similar mistakes are not repeated in the future.

The recalculation of funding does not affect the total amount we plan to spend in the Core Schools Budget in 2024-25 - which includes funding for mainstream schools, and funding for high needs. It will remain at £59.6bn in 2024-25, the highest ever in real terms per pupil. This is a percentage increase from 2023-24 of 3.2%, and will properly fund the teacher pay increase agreed in 2023.

The recalculated funding is at record levels, at an average of £5,300 per primary school pupil and £6,830 per secondary school pupil in 2024-25, up from £5,200 and £6,720 respectively in 2023-24. The 2024-25 high needs NFF allocations (which fund provision for children with complex SEND) are unaffected, as are other funding streams outside the NFF, including the Teachers' Pay Additional Grant announced in the summer.

Schools have not yet received their 2024-25 funding – so the correction of this error does not mean adjusting any funding that schools have already received. Likewise, the error will not impact on the publication of the Dedicated Schools Grant (DSG) in December, or when schools will receive their final allocations for 2024-25.

Nevertheless, we recognise that the correction of this error will be difficult for local authorities and frustrating for some school leaders, which is why the Department has worked as quickly as possible to rectify the error. We will work closely with school stakeholders, including unions, to communicate this change and support schools and local authorities.

The documents which will be updated and replaced with new versions today are:

- The policy document for the 2024-25 NFF, which is available on: [National funding formula for schools and high needs - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/policies/national-funding-formula-for-schools-and-high-needs)
- The "national funding formula: summary table", and the "impact of the schools NFF" tables, published on: [National funding formula tables for schools and high needs: 2024 to 2025 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/tables/national-funding-formula-tables-for-schools-and-high-needs-2024-to-2025)

I expect you will have further questions on the re-publication of the NFF once it has been issued, and look forward to discussing them with you in due course.

Again, I would want to express my sincere apologies that this error has occurred, and reassure you that rigorous measures are being put in place to ensure that it will not be repeated.

Yours sincerely,



**SUSAN ACLAND-HOOD
PERMANENT SECRETARY**

Appendix 2

Factor	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25 Original	2024-25 Revised
Primary KS1&2 AWPU	£2,747	£2,857	£3,123*	£3,217	£3,394**	£3,597***	£3,562***
Secondary KS3 AWPU	£3,863	£4,018	£4,404*	£4,536	£4,785**	£5,072***	£5,022***
Secondary KS4 AWPU	£4,386	£4,561	£4,963*	£5,112	£5,393**	£5,717***	£5,661***
Primary & Secondary FSM	£440	£450	£460	£470	£480	£490	£490
Primary FSM6	£540	£560	£575	£590	£705**	£830***	£820***
Secondary FSM6	£785	£815	£840	£865	£1,030**	£1,210***	£1,200***
IDACI Primary Band A	£575	£600	£620	£640	£670	£685	£680
IDACI Primary Band B	£420	£435	£475	£490	£510	£520	£515
IDACI Primary Band C	£390	£405	£445	£460	£480	£490	£485
IDACI Primary Band D	£360	£375	£410	£420	£440	£450	£445
IDACI Primary Band E	£240	£250	£260	£270	£280	£285	£285
IDACI Primary Band F	£200	£210	£215	£220	£230	£235	£235
IDACI Secondary Band A	£810	£840	£865	£890	£930	£950	£945
IDACI Secondary Band B	£600	£625	£680	£700	£730	£750	£740
IDACI Secondary Band C	£560	£580	£630	£650	£680	£695	£690
IDACI Secondary Band D	£515	£535	£580	£595	£620	£635	£630
IDACI Secondary Band E	£390	£405	£415	£425	£445	£455	£450
IDACI Secondary Band F	£290	£300	£310	£320	£335	£345	£340
Prior Attainment – Primary	£1,022	£1,065	£1,095	£1,130	£1,155	£1,185	£1,170
Prior Attainment – Secondary	£1,550	£1,610	£1,660	£1,710	£1,750	£1,790	£1,775
EAL – Primary	£515	£535	£550	£565	£580	£595	£590
EAL - Secondary	£1,385	£1,440	£1,485	£1,530	£1,565	£1,605	£1,585
Mobility – Primary	£0	£875	£900	£925	£945	£970	£960
Mobility – Secondary	£0	£1,250	£1,290	£1,330	£1,360	£1,395	£1,380
Lump Sum	£110,000	£114,400	£117,800	£121,300	£128,000**	£135,700***	£134,400***
Sparsity – Primary (Max.)	£25,000	£26,000	£45,000	£55,000	£56,300	£57,700	£57,100
Sparsity – Secondary (Max.)	£65,000	£67,500	£70,000	£80,000	£81,900	£83,900	£83,000
Primary - MPPFL	£3,500	£3,750	£4,180	£4,265	£4,405	£4,655	£4,610
Secondary – MPPFL	£4,800	£5,000	£5,415	£5,525	£5,715	£6,050	£5,995

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

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

*** - Incorporates the Mainstream Schools Additional Grant for 2024-25 for AWPU, FSM6 and Lump Sum

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Wiltshire Council

School Funding Working Group – 27 November 2023

Schools Forum – 5 December 2023

Allocation of Funding for Pupil Growth 2024-25

Purpose of the Report

1. To seek agreement on the methodology for allocating funding for pupil growth from the school's block growth fund in 2024-25.

Background

2. Wiltshire currently operates a growth fund and Schools Forum agreed to a number of criteria for the allocation of funding for pupil growth in previous years. The current growth fund criteria have previously been confirmed as being fully compliant by the Department for Education (DfE).
3. The methodology to calculate growth funding under the National Funding Formula (NFF) was introduced for the 2019 to 2020 financial year and has remained the same for the 2024 to 2025 financial year. This means that funding will be based on the observed differences between the primary and secondary number on roll in Wiltshire between the October 2022 and October 2023 school censuses.
4. Following the DfE's consultation in 2022, the School Funding Operational Guidance for 2024-25 has been updated to confirm that the Growth Fund can only be used to
 - support growth in pre-16 pupil numbers to meet basic need
 - support additional classes needed to meet the infant class size regulation
 - meet the revenue cost of new schools
5. It was further confirmed that the Growth Fund cannot be used to support
 - schools in financial difficulty
 - general growth due to popularity

Funding Methodology

6. Growth allocations for 2024-25 will continue to be based on pupil data from the October 2022 census and the October 2023 censuses.
7. Funding is allocated to local authorities based on the actual growth in pupil numbers they experienced over the previous year which ensures that over time local authorities are funded on the basis of the actual growth they experience (on a lagged basis), rather than being based upon historic spending decisions.
8. The DfE measure growth within local authorities at **middle layer super output area** (MSOA)¹ level. MSOAs are used as these are small enough geographical areas to detect 'pockets' of growth within local authority areas. Growth is measured by counting the increase in pupil numbers in each MSOA in the local authority between

the October 2022 and October 2023 censuses. Only positive increases in pupil numbers will be included, so positive growth in one area, and negative growth in another, will not be denied growth funding.

9. In Wiltshire, growth is measured by separating the county into 62 MSOA's with an average of 4 schools in each MSOA area.
10. For each local authority, the growth factor allocates:
 - **£1,550** for each primary 'growth' pupil (was £1,520, £1,485, £1,455, £1,425, and £1,370 previously)
 - **£2,320** for each secondary 'growth' pupil, (was £2,275, £2,220, £2,175, £2,130, and £2,050 previously) and
 - **£76,195** for each brand-new school that opened in the previous year. (was £74,700, £70,800, £68,700, £67,000, and £65,000 previously)
11. The DfE do not expect local authorities to use these rates in their local arrangements for funding growth. The growth factor in the NFF is a proxy for overall growth costs at local authority level, and not at the level of individual schools.
12. All local authorities (LA's) generally allocate growth funding using a local arrangement as there is no national method adopted for allocating growth funding. Therefore, Schools Forum should continue to make decisions about growth funding locally as they do now.
13. The DfE consultation during the Summer of 2022, proposed options around the future for Growth funding and whilst no radical reforms have been implemented, it was recognised that awarding growth funding at a local level would continue to be appropriate, with LA's being able to apply local knowledge and intelligence.

(The Wiltshire allocation for 2024-25 will be announced in December as part of the schools funding announcement.)

Main Considerations

14. The growth funding forms part of the local authority's Schools Block of funding. For 2024-25, growth funding will be allocated to Wiltshire using the formulaic approach, based upon lagged growth data. With regard to allocating funding from the growth fund, the requirements are that:
 - a) can be used only for the purposes of supporting growth in pre-16 pupil numbers to meet basic need
 - b) to support additional classes needed to meet the infant class size regulations
 - c) to meet the costs of new schools
 - d) the fund must be used consistently for the benefit of both maintained schools and academies

- e) any funds remaining at the end of the financial year will form part of the overall DSG surplus or deficit balance.
 - f) local authorities will be required to produce criteria on which any growth funding is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of all growth funding. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid
 - g) local authorities will need to propose the criteria and size for the growth fund to Schools Forum and gain its agreement on both the criteria and size of the fund before growth funding is allocated.
15. In addition to the above requirements, for the 2024-25 year local authorities are required to provide growth funding where a school or academy has agreed with the local authority to provide an extra class to meet basic need in the area, using a minimum funding level equating to

primary growth factor value (£1,550) × number of pupils × ACA

16. The primary growth factor value will be used for all school types – recognising there is one teacher pay scale and that this funding is a minimum value.

Proposed Criteria

17. The proposed criteria for funding pupil growth within the local Wiltshire funding formula in 2024-25 are as follows:

New School Allowance (unchanged from 2013-14):

18. Schools receive funding in advance of pupils arriving in the school, based on the result of the pupil teacher ratio rounded up to the nearest next whole number. The PTRs used are 26.5:1 for KS1 & 27.5:1 for KS2.
19. The topped-up element to the next whole number is arrived at by multiplying the result by the salary of a teacher on the top point of the teacher's main scale 6 + on-costs. This element will apply until the first-year group has left the school or until the school is full (whichever occurs first).
20. In addition, the costs of a head teacher and 10 hours admin support will be available one "old" term before opening. 55% of the Lump Sum will be available two "old" terms before opening. In the first year of opening the school will also receive funding towards supplies and services comprising, 34% of the Lump Sum, 17% in the second year & 8.5% in the third year after opening. (The Lump Sum is proposed at £134,400, the NFF rate for 2024-25).
21. New schools may also receive an estimate of the new pupil intake for the forthcoming academic year. This approach will be in place for the number of years equal to the number of year groups at the school.

Class Expansion for Basic Need (unchanged from 13-14):

22. Where a school is expanded to provide additional classes to meet 'basic need' for places identified by the LA, from the month of opening the additional class for the remainder of the financial year only, the school will receive the relevant 12ths x 30 x

relevant AWPU for each additional class. Where a full class may not be needed then the school would receive the relevant 12ths x estimate of increased September intake x relevant AWPU. The definition of “expanded” is that a building project or addition of a mobile classroom has taken place.

23. Having looked at the new requirement set by the DfE as detailed at paragraph 15, the Wiltshire criteria would be fully compliant, as the AWPU value is used which is greater than the ‘primary growth factor value’.

Infant Class Size Increases:

24. This is payable to a Primary School with infant classes which is required to set up an additional class in the Autumn term as required by the infant class size regulations, and the school cannot accommodate all its additional Reception and Key Stage 1 pupils in classes of 30 or less, i.e., the total number of pupils in the 3-year groups exceeds a multiple of 30. Where the total increase in NOR between the two October census dates is greater than 13 and necessitates that an extra class would be required, then additional funding is allocated per additional class.
25. Schools Forum is required to consider and approve the above criteria for application in 2024-25.

Falling Rolls Fund

26. Historically, LA’s were able to set aside Schools Block funding to create a small ‘Falling Rolls’ fund to support good schools with falling rolls, where local planning data shows that surplus places will be needed within the next three financial years.
27. For the first time, in 2024 to 2025 the DfE will allocate funding to LA’s based on both growth and falling rolls.
28. Falling rolls funding will be distributed on the basis of the reduction in pupil numbers that local authorities experience each year. Funding will be based on the observed differences between the primary and secondary number on roll between the October 2022 and October 2023 school censuses.
29. Falling rolls are measured at the MSOA within each local authority. This enables the DfE to capture falling rolls in small geographical areas within local authorities.
30. The falling rolls allocation for each local authority will be £140,000 per MSOA which sees a 10% or greater reduction in the number of pupils on roll between the two census years.
31. Local authorities will continue to have discretion over whether to operate a falling rolls fund. Where local authorities operate a fund, they will only be able to provide funding where school capacity data 2022 (SCAP) shows that school places will be required in the subsequent three to five years.
32. This SCAP requirement replaces previous guidance that funding may only be used where local planning data shows that the surplus places will be needed within the next 3 financial years.
33. The requirement that schools must be Ofsted rated ‘good’ or ‘outstanding’ to be eligible for falling rolls funding will no longer apply from the 2024 to 2025 financial year.

34. Schools Forum should agree both the value of the fund and the criteria for allocation. As with the growth fund, funding for a falling rolls fund would have to come from within the existing NFF schools block.
35. Any fund established for the purposes of a Falling Rolls fund would represent a top slice of the Schools Block. Criteria would need to be established to support the fund, including clear trigger points for qualification. Compliant criteria could include.
- SCAP shows that school places will be required in the subsequent three to five years (this is a mandatory requirement)
 - surplus capacity exceeds a minimum number of pupils, or a percentage of the published admission number
 - formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort
 - the school will need to make redundancies to contain spending within its formula budget and it is expected (using SCAP data – detailed above) that these posts will need to be re-filled in the subsequent 3 to 5 years
36. Any formula for funding schools could include.
- A rate per vacant place and maximum number of places
 - A lump sum payment to schools
37. Wiltshire Schools Forum has always resisted the establishing of a Falling Rolls Fund and is being asked to consider establishing such a fund, considering its previous decisions on this topic and the additional pressures being placed upon the Schools Block.
38. There has been no pressure from schools or other groups for the establishing of a Falling Rolls Fund, due to the previous limitations around the criteria, impact upon affordability from the Schools Block and the size of any potential funding awarded to schools, which would need to be meaningful.

Proposal

39. It is proposed that:
- a) Schools Forum approve the criteria for allocating pupil Growth Fund in 2024-25.
 - b) Schools Forum agree that the budget for the Growth Fund to be set at its meeting in January 2024, when the full DSG has been confirmed for the 2024-25 year.
 - c) Schools Forum give consideration to the establishing of a Falling Rolls Fund and any criteria befitting such a fund.

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Wiltshire Council

School Funding Working Group – 27 November 2023

Schools Forum - 5 December 2023

Dedicated Schools Grant Consultations 2024-25

Purpose of the Report

1. To update Schools Forum with the results of the recent Autumn consultations relating to.
 - De-delegation of central services - Maintained Schools only
 - De-delegation in support of former LAMB grant – Maintained Schools only
 - Transfer of funds from Schools Block to High Needs Block – all schools
2. The survey results will help to inform Schools Forum decisions for setting the budgets for the 2024-25 financial year.

De-Delegation of Central Services Consultation Responses

3. Under the “soft formula”, funding should be fully delegated to all schools, however certain centrally provided services can be ‘de-delegated’ for maintained schools only, with approval of the respective maintained Schools Forum representatives.
4. The funding regulations require that all maintained schools are consulted and given the opportunity to express their preferences for the services which can be de-delegated. The services consulted as part of the 2024-25 consultation process were:
 - Free School Meal Eligibility Checks
 - Access Budget Planning Software Licence
 - Trade Union Facilities Costs
 - Maternity Costs
 - Ethnic Minority Achievement Service
 - Traveller Education Service
 - Behaviour Support Service
5. The consultation regarding de-delegation took place through Right Choice during the Autumn term, to enable maintained schools to consider their responses. The consultations closed on 17 November 2023. Schools Forum members can see the questions and results of the consultation, detailed in Appendix 1.
6. A total of 25 responses were received, 23 responses from Primary Schools and 2 from Secondary Schools. This compares more favourably than the consultation for the 2023-24 year where 21 responses were received. It is widely known that the majority of maintained schools rely on their Schools Forum colleagues to make the appropriate decisions on their behalf.
7. The results received were overwhelmingly in favour of retaining the de-delegated services in both the Primary and Secondary schools which will inform eligible Schools Forum representatives when voting on the school budgets for 2024-25.

De-Delegation – School Improvement Services 2024-25 (LAMB Grant)

8. The Local Authority Monitoring and Brokering (LAMB) Grant had been provided to local authorities since 2017, to help fulfil their core improvement activities. Funding was based on the number of maintained schools and the Department for Education (DfE) reduced the grant by 50% in 2022-23 and removed it fully in 2023-24.
9. Local authorities can fund improvement services through either de-delegation or on a traded basis. For the 2022-23 year, maintained schools' members of Schools Forum agreed to fund the loss of 50% of the LAMB grant through de-delegation and for the 2023-24 year, agreed to fund the full removal of the LAMB Grant (£459k).
10. In order to provide Schools Forum with a steer for the 2024-25 year, a local consultation was arranged to provide maintained schools with the opportunity to express their preference regarding continuing a contribution to support the loss of LAMB Grant funding. A copy of the consultation is held at Appendix 1.
11. The consultation was open to all maintained schools and a total of 14 responses were received (down from 39 for 2023-24), which can be broken down as follows.
 - 2 secondary schools
 - 11 primary schools
 - 1 Special school
12. Of the schools that responded, the results can be summarised as below.

All Schools						
Option	Impact	1st Choice	2nd Choice	3rd Choice	4th Choice	5th Choice
Schools don't fund any loss of LAMB	Reduction in Services - £459k	2	1	0	0	11
Schools fund 50% loss of LAMB	Reduction in Services - £229.5k	4	2	0	8	0
Schools fund 75% of LAMB	Reduction in Services - £114.8k	0	3	11	0	0
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k	0	8	3	3	0
Schools fund 100% of LAMB	Existing service maintained	8	0	0	3	3

Primary						
Option	Impact	1st Choice	2nd Choice	3rd Choice	4th Choice	5th Choice
Schools don't fund any loss of LAMB	Reduction in Services - £459k	2	1	0	0	8
Schools fund 50% loss of LAMB	Reduction in Services - £229.5k	3	2	0	6	0
Schools fund 75% of LAMB	Reduction in Services - £114.8k	0	2	9	0	0
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k	0	6	2	3	0
Schools fund 100% of LAMB	Existing service maintained	6	0	0	2	3

Secondary & Special						
Option	Impact	1st Choice	2nd Choice	3rd Choice	4th Choice	5th Choice
Schools don't fund any loss of LAMB	Reduction in Services - £459k	0	0	0	0	3
Schools fund 50% loss of LAMB	Reduction in Services - £229.5k	1	0	0	2	0
Schools fund 75% of LAMB	Reduction in Services - £114.8k	0	1	2	0	0
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k	0	2	1	0	0
Schools fund 100% of LAMB	Existing service maintained	2	0	0	1	0

13. This data will inform the decision making around the 2024-25 budget for school improvement services. The key points from the consultation are.
- ✓ 8 of the 14 respondents supported continuing to fund at the 100% level
 - ✓ Only 2 schools set their first preference as being not to fund at all (one school is a very small school, who proposed this due to financial constraints)
14. The DfE have confirmed that any commitment to fund School Improvement services will come under the de-delegation methodology and will be subject to annual agreement.
15. As with the centrally de-delegated services, it is widely recognised that the majority of maintained schools rely on their Schools Forum colleagues to make the appropriate decisions on their behalf.

Transfer of Schools Block to Support the High Needs Block

16. Schools have been consulted during recent years regarding a potential transfer of funds between the Schools Block and the High Needs Block of the DSG. Whilst it has been a generally unwelcome question to ask schools, members of Schools Forum have acted with integrity and in the greater interests of schools and supported a transfer of funds to help with the increasing demand and costs of SEN, within the county.
17. The funding regulations do allow for a transfer of funding between the Schools Block and other blocks within the DSG. In the last five financial years, Schools Forum agreed to the following transfers.
- 2019-20 - £2.2m which equated to **0.8%** of Schools Block funding
 - 2020-21 - £2.065m which equated to **0.7%** of Schools Block (subsequently reduced to 0.5% by the Secretary of State.)
 - 2021-22 - £1.517m which equated to **0.5%** of Schools Block funding
 - 2022-23 - £1.628m which equated to **0.5%** of Schools Block funding
 - 2023-24 - £1.716m which equated to **0.5%** of Schools Block funding
18. Local Authorities have the flexibility to move up to 0.5% of the Schools Block of funding, with the agreement of its Schools Forum. Anything higher would require approval from the Secretary of State through a disapplication request.
19. It was agreed at previous Schools Forum meetings that a request to transfer greater than 0.5% would not be applied for, due to previous decisions of the Secretary of State, unless the results of the consultation supported a greater transfer. It should be noted that if the Council has a Safety Valve agreement in place it is likely that a request to transfer greater than 0.5% would be looked on favourably by the Secretary of State via a disapplication request.
20. In order for Schools Forum to make a decision about a potential transfer, the autumn consultation was issued through Right Choice as a survey with a closing date of 17 November 2023, enabling schools to consider their responses.
21. Schools Forum members can see the questions and results of the consultation, detailed in Appendix 2.

22. This consultation was open to all schools, both maintained and academy schools and a total of 16 responses were received, down slightly from the 21 responses received last year and can be broken down as follows.

- 2 secondary schools
- 12 primary schools
- 2 special schools

23. Of the schools that responded, the results can be summarised as below.

- All 16 respondents supported a transfer of funds from the Schools Block to the High Needs Block, with the majority supporting a 0.5% transfer.
- No respondents supported a reduction in Top-Up values to reduce expenditure within the High Needs Block.
- No respondents supported a 'Hybrid' option of a lower block transfer and a reduction in Top-Up values.
- The breakdown of transfer values and levels of support is detailed in the table below.

Value	Schools	% Support
£0.5m (0.14%)	2	12.5%
£1.0m (0.27%)	1	6.25%
£1.5m (0.41%)	1	6.25%
£1.8m (0.5%)	11	68.75%%
£2.0m (0.55%)	1	6.25%

24. The data from these consultations will inform the decision making around the 2024-25 budget for both De-delegation in maintained schools and a transfer of funding from the Schools Block to the High Needs Block.

25. Decisions in relation to any transfer from the Schools Block to the High Needs Block will also need to be made in the context of the Council's proposed Safety Valve agreement which will be presented to Schools Forum on 5 December and submitted to the Department for Education on 15 December. The Council will be required to incorporate assumptions for block transfers over the period of the plan and will link any proposal to additional support for mainstream schools.

Proposals

26. Schools Forum is asked to note the local consultation responses in relation to the schools delegated budget for the 2024-25 financial year.

27. Schools Forum is asked to make 'in principle' decisions in accordance with the consultation responses as below.

- **De-delegation** of central services for Maintained schools
 - FSM – primary and secondary
 - Licences – primary and secondary
 - Trade Union – primary and secondary
 - Maternity – primary and secondary
 - Ethnic Minority Support – primary only
 - Traveller Education – primary only
 - Behaviour Support – primary only

- **De-delegation** of funding to support school improvement services for maintained schools. To continue to fund at the rate of 100% loss in funding (£459k).

- **Block transfer** between Schools Block and the High Needs Block, subject to affordability when school funding for 2024-25 has been confirmed.
 - In principle, transfer of 0.5% of Schools Block to the High Needs Block, the maximum allowable without Secretary of State approval which equates to approximately £1.8m.
 - To consider transfer of 0.55% of Schools Block to the High Needs Block. Such a transfer would equate to £2m and will require the submission of a disapplication request.

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Appendix 1 – De-Delegation Consultation

Questions

DfE Heading	Wiltshire Budget	Delegate?	Retain Centrally?
Free school meals eligibility	Free School Meals Eligibility Service		
Licences/subscriptions	HCSS Licence		
Staff costs – supply cover	Trade Union Duties		
	Maternity Costs		
Support for minority ethnic pupils and underachieving groups	Ethnic Minority Achievement Service (EMAS) – Primary		
	Traveller Education Service – Primary		
Behaviour support services	Primary Behaviour Support Service		

Results

A summary of the results is set out below.

PRIMARY	FSM	Licences	Trade Union	Maternity	EMAS	Traveller Education	Behaviour Support
Delegate	0	0	0	0	4	2	1
De-delegate	23	23	23	23	19	21	22
Total	23	23	23	23	23	23	23

SECONDARY	FSM	Licences	Trade Union	Maternity	EMAS	Traveller Education	Behaviour Support
Delegate	0	0	0	0	N/a	N/a	N/a
De-delegate	2	2	2	2	N/a	N/a	N/a
Total	2	2	2	2	N/a	N/a	N/a

Appendix 2 – Block Transfer Consultation

Qu 1 – Please enter your DfE Number and school name here:

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Qu 2a – Taking the factors above into account, do you support a transfer of funding from the Schools Block to the High Needs Block?

Yes	
No	

Qu 2b – If you support a transfer, please indicate the amount of transfer:

Value to Transfer	£/Pupil	Please select
£0.0m (0.0%)	£0.00 / pupil	
£0.5m (0.14%)	£7.77 / pupil	
£1.0m (0.27%)	£15.54 / pupil	
£1.5m (0.41%)	£23.31 / pupil	
£1.8m (0.5%)	£28.55 / pupil	
£2.0m (0.55%)	£31.08 / pupil	

Qu 2c - No transfer of funding from the Schools Block to the High Needs Block for 2024-25. The impact of this would be that Top-Ups and Named Pupil Allowance (NPA) funding levels would have to be reduced to help with cost pressures in the High Needs Block. Do you support a reduction in these rates?

Yes	
No	

Qu 2d - Would you prefer to see a hybrid of the above with a transfer from Schools Block to top up the High Needs Block together with reduced values for top ups and Named Pupil Allowances?

Yes	
No	

Qu 3 - If you do not agree to the transfer of funds or the reduction of top-up funding levels, how else do you suggest that we fill the funding gap that we have for High Needs?

Appendix 2 – Block Transfer Consultation

Consultation Responses

Value to Transfer

School	Support Transfer	Value to Transfer					
		0% (£0m)	0.14% (£0.5m)	0.27% (£1.0m)	0.41% (£1.5m)	0.5% (£1.8m)	0.55% (£2.0m)
P1	Yes		✓				
P2	Yes					✓	
P3	Yes					✓	
P4	Yes			✓			
P5	Yes					✓	
P6	Yes					✓	
P7	Yes					✓	
P8	Yes					✓	
P9	Yes					✓	
P10	Yes						✓
P11	Yes				✓		
P12	Yes		✓				
S1	Yes					✓	
S2	Yes					✓	
Sp1	Yes					✓	
Sp2	Yes					✓	

Wiltshire Council

School Funding Working Group – 27 November 2023

Schools Forum - 5 December 2023

Additional Support for Maintained Schools in Financial Difficulty in 2023-24

Purpose of report

1. To set out the details behind the additional support funding for maintained schools in the 2023-24 year.
2. To seek agreement from members of Schools Forum for the distribution of the support funding to maintained schools currently in a financial deficit.

Background

3. The Department for Education (DfE) recently announced additional funding to support schools in financial difficulty in the 2023-24 financial year. This funding is being awarded in addition to supporting schools with the September 2023 Teachers Pay Award.
4. The funding will be used to bolster existing routes that exist to support schools in financial difficulties. Maintained schools seek support through their Local Authority (LA) and academies through the Education and Skills Funding Agency (ESFA).
5. The total national pot of funding of £40m is to be split with £20m being awarded to LA's who have the most significant maintained school deficits. The funding will be allocated proportionately among local authorities who have aggregated school-level deficits which represent more than 1% of their total maintained schools' income at the end of the 2022-23 year. (The remaining £20m will be allocated to expand the existing routes for academies in financial difficulties.)
6. A total of 35 LA's have been awarded funding and Wiltshire has been confirmed as an eligible LA with the funding allocated to support maintained schools for the 2023-24 year standing at £405,503. A list of eligible LA's and the funding allocated is detailed at Appendix 1.
7. This funding is 'one-off' funding and there are no plans to make similar additional funding available again in 2024-25.

Funding in 2023-24

8. The DfE want LA's to be able to use this funding to best support their schools in the individual circumstances in which they find themselves. Therefore, they are giving LA's significant flexibility over how this funding can be used.
9. Local authorities remain responsible for supervising the maintained schools in their area. Where a maintained school is in financial difficulty, it receives guidance and support from colleagues in Wiltshire, provided on a case-by-case basis. Any cumulative deficit in a maintained school needs to be authorised by the LA and a financial recovery plan put in place.
10. The DfE produces a '*Scheme for Financing Maintained Schools*' each year and Section 6.7 of the guidance allows for local authorities to pay cash sums towards elimination of a deficit balance. Such cash sums can be charged to the dedicated schools grant (DSG) only where they form part of a contingency fund approved by maintained school members of Schools Forum under *Regulation 11(5) of, and paragraph 51 of Schedule 2 to, the School and Early Years Finance (England) Regulations 2023*. (This would be funded through 'de-delegating' monies from maintained schools each year to create a Contingency Fund).
11. The DfE have confirmed that LA's in receipt of a portion of the £20 million being allocated in 2023 to 2024, can use this funding as another source of cash towards the elimination of deficit balances. The conditions of grant for this addition to DSG will allow the money to be used for this purpose.
12. This does not mean that every school with a deficit within an LA should be given additional funding. The DfE expect funding to be allocated on a case-by-case basis, taking into account the severity of the school's position and prioritising those in greatest need. Local authorities should report to their Schools Forum on how they are using the money, which should be fully utilised in the 2023-24 year.

Proposals for Use of the Additional Funding

13. At the October 2023 Schools Forum meeting, members were presented with details of all maintained schools balances, both surplus and deficit balances. A copy of the table presented to Schools Forum detailing schools in deficit is detailed below.

Analysis of schools with a deficit at end of 2022/23										
		2019/20		2020/21		2021/22		2022/23		
		Deficit £	As a % of SBS							
2009	Bratton Primary School	Primary	-	-	8,820	-1.5	-117,652	-17.49	-65,336	-9.71%
2178	Princecroft	Primary	-	-	-	-	-35,672	-4.33	-	-
2190	Woodlands	Primary	-8,488	-9.96	-	-	-	-	-68,900	-7.03%
2191	Manor Fields	Primary	-	-	-	-	-	-	-39,051	-3.63%
3017	Longford CE	Primary	-81,156	-21.16	-	-	-	-	-	-
3140	Oaksey CE VA	Primary	-54,253	-12.81	-18,462	-4.36	-	-	-	-
3172	Stratford Sub Castle	Primary	-211,201	-34.26	-280,594	-45.52	-359,261	-54.92	-378,782	-57.91%
3174	Sutton Veny	Primary	-2,587	-0.38	-	-	-	-	-	-
3192	Westbury Juniors	Primary	-	-	-	-	-	-	-5,204	-0.43%
3193	Westbury Leigh	Primary	-186,552	-13.72	-96,400	-7.1	-	-	-3,772	-0.27%
3229	Coombe Bissett	Primary	-	-	-	-	-8,396	-1.49	-	-
3230	Dinton	Primary	-4,138	-1.02	-	-	-	-	-	-
3316	Chapmanslade	Primary	-	-	-	-	-13,464	-2.57	-4,632	-0.88%
3318	Chilton Foliat CE	Primary	-108,569	-27.90	-118,014	-30.33	-114,251	-22.39	-39,880	-7.82%
3383	Sarum St Paul's	Primary	-132,183	-14.99	-60,206	-6.83	-69,516	-7.63	-120,835	-13.27%
3435	Wardour	Primary	-4,584	-1.12	-	-	-	-	-	-
3453	Chilmark	Primary	-1,798	-0.47	-	-	-	-	-	-
3459	Hindon	Primary	-21,990	-7.87	-	-	-	-	-	-
3465	Wylve Valley	Primary	-	-	-3,282	-0.77	-935	-0.18	-16,714	-3.15%
3469	Five Lanes	Primary	-41,118	-10.32	-16,264	-4.08	-	-	-	-
3471	Lyneham Primary	Primary	-58,837	-4.49	-32,832	-2.51	-85,861	-6.65	-	-
5201	Downton	Primary	-47,841	-0.05	-23,783	-2.45	-26,279	-2.35	-15,544	-1.39%
4000	Abbeyfield	Secondary	-2,238,206	-42.20	-1,943,168	-36.82	-1,687,885	-35.24	-1,457,779	-30.44%
4070	Stonehenge	Secondary	-135,385	-3.03	-	-	-	-	-	-
Total value of deficits			-3,338,886		-2,601,824		-2,519,172		-2,216,429	
Total number of schools				17		11		11		12

Option 1

14. Applying a straight-line formulaic approach would award funding to all the schools in a deficit. However, whilst the values would in some cases be negligible, the funding is directly proportional with the scale of the individual deficits. In many ways, this approach is the most equitable as it awards funding to all of the schools with a deficit ensuring parity. The table below shows the allocations based upon a straight line basis.

			2022/23		£405,503 Distribution Straight-Line Basis
			Deficit £	As a % of SBS	
2009	Bratton Primary School	Primary	-65,336	-9.71%	11,953
2190	Woodlands	Primary	-68,900	-7.03%	12,605
2191	Manor Fields	Primary	-39,051	-3.63%	7,144
3172	Stratford Sub Castle	Primary	-378,782	-57.91%	69,299
3192	Westbury Juniors	Primary	-5,204	-0.43%	952
3193	Westbury Leigh	Primary	-3,772	-0.27%	690
3316	Chapmanslade	Primary	-4,632	-0.88%	848
3318	Chilton Foliat CE	Primary	-39,880	-7.82%	7,296
3383	Sarum St Paul's	Primary	-120,835	-13.27%	22,107
3465	Wylve Valley	Primary	-16,714	-3.15%	3,058
5201	Downton	Primary	-15,544	-1.39%	2,844
4000	Abbeyfield	Secondary	-1,457,779	-30.44%	266,706
Total value of deficits			-2,216,429		405,503
Total number of schools				12	

Option 2

15. Another option available would be to only grant funding where a significant sum, £5,000 or £10,000 was to be awarded. The table below sets out how this funding would be allocated.

			2022/23		Minimum Award of £5,000+	Minimum Award of £10,000+
			Deficit £	As a % of SBS		
2009	Bratton Primary School	Primary	-65,336	-9.71%	12,206	12,667
2190	Woodlands	Primary	-68,900	-7.03%	12,872	13,358
2191	Manor Fields	Primary	-39,051	-3.63%	7,295	
3172	Stratford Sub Castle	Primary	-378,782	-57.91%	70,764	73,434
3192	Westbury Juniors	Primary	-5,204	-0.43%		
3193	Westbury Leigh	Primary	-3,772	-0.27%		
3316	Chapmanslade	Primary	-4,632	-0.88%		
3318	Chilton Foliat CE	Primary	-39,880	-7.82%	7,450	
3383	Sarum St Paul's	Primary	-120,835	-13.27%	22,574	23,426
3465	Wylve Valley	Primary	-16,714	-3.15%		
5201	Downton	Primary	-15,544	-1.39%		
4000	Abbeyfield	Secondary	-1,457,779	-30.44%	272,341	282,618
Total value of deficits			-2,216,429		405,503	405,503
Total number of schools				12		

Option 3

16. Local authority officers have discussed proposals being considered by other authorities and another option being proposed is to only fund those schools where a deficit has been in place for 3 or more years and subject to a minimum threshold value. Using this logic and applying it to the Wiltshire deficit schools would lead to the funding allocation, detailed in the table below.

		2022/23		Deficit Years	Minimum award of £10,000 & 3yrs+	
		Deficit £	As a % of SBS			
2009	Bratton Primary School	Primary	-65,336	-9.71%	3yrs	13,098
2190	Woodlands	Primary	-68,900	-7.03%	1yr	
2191	Manor Fields	Primary	-39,051	-3.63%	1yr	
3172	Stratford Sub Castle	Primary	-378,782	-57.91%	4+ yrs	75,936
3192	Westbury Juniors	Primary	-5,204	-0.43%	1yr	
3193	Westbury Leigh	Primary	-3,772	-0.27%	1yr	
3316	Chapmanslade	Primary	-4,632	-0.88%	2yrs	
3318	Chilton Foliat CE	Primary	-39,880	-7.82%	4+ yrs	
3383	Sarum St Paul's	Primary	-120,835	-13.27%	4+ yrs	24,224
3465	Wylve Valley	Primary	-16,714	-3.15%	1yr	
5201	Downton	Primary	-15,544	-1.39%	4+ yrs	
4000	Abbeyfield	Secondary	-1,457,779	-30.44%	4+ yrs	292,245
Total value of deficits			-2,216,429			405,503
Total number of schools				12		

17. Whilst there are fixed drivers for the distribution of the funding, a wide number of options are available, all of which are equitable within a defined set of criteria.

Proposal

18. Schools Forum to consider and discuss the distribution options in light of the most equitable approach and agree a proposed methodology on behalf of maintained schools.

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**Funding for local authorities to support their maintained schools in
financial difficulty: allocations for 2023-24**

No.	LA Name	LA number		Allocation
1	Liverpool	341	£	1,741,291.50
2	North Tyneside	392	£	1,868,147.92
3	Worcestershire	885	£	1,563,479.89
4	North Yorkshire	815	£	972,188.39
5	Enfield	308	£	965,741.96
6	Lambeth	208	£	959,277.21
7	Bradford	380	£	934,212.12
8	Southampton	852	£	559,332.03
9	Bristol, City of	801	£	675,992.45
10	South Tyneside	393	£	605,844.96
11	County Durham	840	£	582,480.41
12	Greenwich	203	£	554,688.45
13	Southwark	210	£	516,380.60
14	Sheffield	373	£	517,960.04
15	Isle of Wight	921	£	517,146.08
16	Hillingdon	312	£	491,623.25
17	Leicester	856	£	422,217.56
18	Lewisham	209	£	458,226.44
19	Wiltshire	865	£	405,502.97
20	Cumberland	942	£	371,578.64
21	Islington	206	£	364,816.41
22	Hackney	204	£	359,975.15
23	Northumberland	929	£	344,356.84
24	Waltham Forest	320	£	343,459.83
25	Oxfordshire	931	£	331,272.92
26	Walsall	335	£	309,601.02
27	Somerset	933	£	288,318.49
28	Wirral	344	£	296,310.10
29	Westminster	213	£	290,418.52
30	Westmorland and Furness	943	£	301,410.78
31	Croydon	306	£	264,529.05
32	Windsor and Maidenhead	868	£	222,129.63
33	Reading	870	£	218,584.70
34	Sutton	319	£	202,475.48
35	Gateshead	390	£	179,028.20