

AGENDA

Meeting: Schools Forum
Place: Online Meeting - Via Microsoft Teams
Date: Thursday 9 June 2022
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.

Press enquiries to Communications on direct lines (01225) 713114/713115.

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Membership:	Representing:
Aileen Bates	WGA - Special School Governor Representative
Lyssy Bolton	Early Years Representative (PVI)
Andy Bridewell	PHF - Maintained Primary Representative
Rebecca Carson	PHF - Primary Academy Representative
Michele Chilcott	WASSH - Secondary Academy Representative
Sam Churchill	PHF - Maintained Primary Representative
Stella Fowler	WGA - Primary School Governor Representative
Jo Grenfell	Observer - Post 16, Wiltshire College
Jon Hamp	Special School Academy Representative
John Hawkins	Teaching Association Representative
Cllr Ross Henning	Observer - Local Youth Network
Georgina Keily-Theobald	WASSH - Maintained Special School Representative
Graham Nagel-Smith	PHF - Primary Academy Representative
Lisa Percy	WASSH - Secondary Academy Representative
John Proctor	Early Years Representative (PVI)
Giles Pugh	Salisbury Diocesan Board of Education Representative
Nigel Roper	WASSH - Maintained Secondary Representative
Graham Shore	PHF - Primary Academy Representative
Trudy Srawley	Observer - Wiltshire Parent Carer Council
Ros Sutton	WGA - Primary School Governor Representative
Ian Tucker	Chair of WASSH - Secondary Academy Representative
David Whewell	WGA - Secondary School Governor Representative
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 and Changes of Membership**

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

2 **Minutes of the Previous Meeting** (*Pages 7 - 24*)

To approve as a correct record and sign the minutes of the meeting held on 20 January 2022 (copy attached).

3 **Chair's Announcements**

To receive any announcements from the Chair.

4 **Declaration of Interests**

To note any declarations of interests.

5 **Public Participation**

Schools Forum welcomes contributions from members of the public who are able to ask questions or make a statement in relation to the responsibilities and functions of the Forum at each meeting. A maximum of 15 minutes will be allocated to this at the start of each meeting. Please register with the Officer named on the Agenda 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 this agenda **no later than 5pm on Tuesday 7 June 2022** (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. Statements should take no longer than 3 minutes to be read aloud.

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 31 May 2022** to allow a response to be formulated. Questions are limited to a maximum of 2 per person or organisation.

6 **Updates from Working Groups** (*Pages 25 - 32*)

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

- Early Years Reference Group – 31 March 2022
- Joint meeting of the School Funding Working Group and SEN Working Group – 23 May 2022

7 **Update on the work from the F40 Group** (*Pages 33 - 36*)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to provide members of Schools Forum with an update on the membership of F40 and the current work of the F40 group.

8 **Dedicated Schools Budget - Budget Monitoring - 2021-22** (*Pages 37 - 42*)

The report of Marie Taylor (Head of Finance – Children and Education) seeks to present the year end budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2021-22 as at 31st March 2022.

9 **Dedicated Schools Budget - Budget Statement 2022/23** (*Pages 43 - 46*)

The report of Marie Taylor (Head of Finance – Children and Education) seeks to present the budget statement for the Dedicated Schools Grant (DSG) for the financial year 2022-23.

10 **Update from the High Needs Block Working Group** (*Pages 47 - 52*)

The minutes and the papers of the High Needs Block Working Group meeting held on 5 May 2022 is attached. The Forum will also receive an update on behalf of the Working Group.

11 **DFE Consultation - 'Completing the reforms to the National Funding Formula'** (*Pages 53 - 56*)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to provide an update following the DfE consultation with stakeholders regarding their reforms to the National Funding Formula (NFF), which took place between July and September 2021.

12 **Annual Schools Consultation - Delegation of Central Expenditure 2023-24, Funding for Education Functions 2023-24, Transfer of Funding from Schools Block to High Needs Block 2023-24** (*Pages 57 - 64*)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to brief Schools Forum and agree a set of questions to be sent out to all schools in the Autumn of 2022.

13 **Household Support Fund (HSF) - 2022-23** (*Pages 65 - 68*)

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

present the Council's expenditure plan for the Household Support Fund grant received from the Department of Work and Pensions (DWP).

14 **Schools Finance Manual Update**

Schools Forum will receive a verbal update on the Schools Finance Manual (this is information for maintained schools).

15 **Confirmation of Dates for Future Meetings**

To confirm the dates of future meetings, as follows:

6 October 2022

8 December 2022

19 January 2023

16 March 2023.

16 **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 20 JANUARY 2022 AT ONLINE MEETING VIA MICROSOFT TEAMS.

Present:

Nikki Barnett, Aileen Bates, Lyssy Bolton, Andy Bridewell, Rebecca Carson, Michele Chilcott, Sam Churchill, Stella Fowler, Jon Hamp, John Hawkins, Cllr Ross Henning, Graham Nagel-Smith, Lisa Percy (Chair), John Proctor, Giles Pugh, Nigel Roper, Graham Shore (Vice Chair), Trudy Srawley, Ros Sutton, Ian Tucker, David Whewell, Catriona Williamson and Lynn Yendle

Also Present:

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

49 Apologies/Substitutions and Changes of Membership

Apologies were received from Jo Grenfell (Observer- Post 16 – Wiltshire College), and Georgina Keily-Theobald (Maintained Special School representative).

Apologies were also received from Jane Davies (Cabinet Member for Adult Social Care, SEND, Transition and Inclusion), Jackie Day (Early Years Observer), Laura Mayes (Cabinet Member – Children, Education and Skills) and Lucy Townsend (Corporate Director – People/Director of Children’s Services).

Substitutions

Lynn Yendle was substituting for Jon Hamp
Nikki Bennet was substituting for Jo Grenfell.

Membership changes

Welcome to Lyssy Bolton who is the new Early Years representative (replacing Mark Cawley). Welcome to Ros Sutton who is the new second primary school Governor representative.

50 Minutes of the Previous Meeting

The minutes of the previous meeting held on 9 December 2021 were approved.

Resolved:

That the Chairman approve and sign the minutes of the meeting of Schools forum held on 9 December 2021.

51 **Chair's Announcements**

The Chair made the following announcements:

Meeting arrangements for Schools Forum

It had been previously agreed that the December and January meetings of Schools Forum would be held in person at County Hall as it was felt to be easier to make budget decisions around the table, but in response to the national and local Covid rates at the current time this meeting was requested again by the majority to be held virtually.

Passing of a colleague

Schools Forum would like to express its condolences to the family and colleagues of Hazel Ryan. Hazel sadly passed away unexpectedly on 13th December 2021 and leaves behind 2 daughters and 2 lovely grand children. In her role as a School Support Accountant and Strategic Financial Advisor, Hazel had supported all schools in Wiltshire during her 30 year career. She had also supported Schools Forum with preparing and presenting reports, training Headteachers, training Governors and training School Business Managers. Her experience and dedication to supporting Wiltshire schools has been invaluable and she will be missed by all of us.

52 **Declaration of Interests**

There were no interests declared.

53 **Public Participation**

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

54 **Updates from Working Groups**

The Forum noted the update received by way of the minutes of the meeting of the Early Years Reference Group meeting held on 5 January 2022.

There were no questions arising.

The Forum noted the update received by way of the minutes of the meeting of the School Funding and SEN working group held on 10 January 2022.

There were no questions arising.

Resolved:

That Schools Forum note the minutes of the Early Years Reference group meeting on 5 January 2022 and the joint meeting of the School Funding and SEN working group held on 10 January 2022.

55 **School Improvement Services 2022-23 - National and Local Consultation**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on the DfE's response to the consultation 'Reforming how Local Authorities School Improvement functions are funded' and provides feedback from the local consultation sessions and highlighted the following:

- The DfE released its consultation on 29 October 2021 with a closing date for responses of 26 November 2021. The Schools Funding and SEN Working Group met to discuss a response – this was shared with schools and all schools, governors and other stakeholders were encouraged to also respond to the consultation;
- The School Improvement Monitoring and Brokering Grant (SIMB) Grant had been provided to local authorities since 2017 to help fulfil their core school improvement activities;
- The DfE published the results of the consultation on 11 January 2022 and confirmed that they would be reducing the SIMB Grant by 50% in 2022-23 and would remove in full in 2023-24. They would also allow local authorities to fund their school improvement activity via de-delegation from school's budget shares;
- The consultation was well supported with 565 responses which included a significant number from Wiltshire of 40 responses (over 7% of all responses);
- The DfE consider that the SIMB Grant had been primarily used for providing improvement functions including early support and challenge to improve school performance rather than for exercising formal intervention powers;
- Schools had felt that there was a strong argument in favour of early intervention to prevent the need for having to exercise formal intervention, however this appears to have carried little weight for the future funding of the grant;
- The DfE currently expect MAT's and academies to fund this cost from their budgets and for this reason they believe it is right to move towards removing this grant and put school improvement funding on a more even footing;
- The Secretary of State would retain the power to approve the de-delegation contrary to decisions of the Schools Forum if they were

satisfied that the Council had demonstrated that such de-delegation was necessary to ensure the Council is adequately funded to exercise core school improvement activities;

- Obviously, most of the responses to consultation wished for the SIMB Grant to continue, however removal would bring funding arrangements for local authorities' school improvement activity closer in line with academies and would enable Councils to better adjust over time to the Government's long term ambition for all schools to become academies;
- The DfE would update the Schools Causing Concern guidance to ensure that there was more clarity on the core school improvement functions going forward;
- Following a local consultation to gain a steer of opinion - at the December meeting of the Forum, maintained school representatives were asked to give their views and they had asked for the decision to be deferred to this meeting to enable them to carry out further consultation with their maintained school colleagues to gain a broader response;
- The Primary Heads Forum Executive liaised with its members and the Director of Education and Skills arranged two information sessions, including a Q&A opportunity for schools to raise any concerns or queries. Of the local consultation 86% were in support of de-delegation and at the two information sessions 100% and 87% of respondents were in support of de-delegation;
- The consultation for the de-delegation of funding for services for maintained schools must be performed annually and therefore the opportunity exists for maintained schools to participate in shaping the school improvement services in the future;

Cllr Dominic Muns (Portfolio Holder for Education) wished to share the context and thoughts from the Council's elected member perspective – The vast majority of local authority spend was on adult social care and Members had fought hard to ensure that there was adequate funding for children, education and skills with a focus on a level of early intervention so that issues did not get bigger down the line. The Wiltshire Learning Alliance (WLA) had launched in 2021 and school improvement was championed by himself, Cllr Laura Mayes as Cabinet Member and Helean Hughes as Director. Dominic felt that school improvement was crucial that all children were supported with the key point of the WLA being that the closer teams stand together, the better they work together to improve the lives of children and school's performance. Dominic wished to assure Schools Forum that from Cabinet down they understood the importance of school improvement and would provide school improvement support for as long as schools require it.

The Chair reported that she had spoken to Georgina Keily-Theobald (maintained special school representative) prior to the meeting who valued the

school improvement service and felt strongly that she wished to support the proposal for de-delegation of school improvement services.

The Chair of Primary Heads Forum confirmed that there was an interesting response to the PHF consultation and that no schools wanted the budget to be top sliced but the majority agreed that some kind of school improvement service is needed. On that basis PHF members would support the proposal of a top slice to top up the 50% of funding that was being withdrawn by the DfE to ensure there was 100% of school improvement funding for the 2022-23 year but would wish for this decision to be reviewed for the 2023-24 year.

Resolved: That Schools Forum

- 1. Note the outcome from the DfE's consultation and the local consultation responses in relation to the School Improvement Services for the 2022-23 financial year.**
- 2. Agree to de-delegate funding in support of School Improvement Services being provided for the 2022-23 year. (*This decision was made later in the meeting under Agenda item 9*).**

56 **School Budget Setting 2022-23**

56a School Revenue Funding 2022-23 - Funding Settlement and Budget Setting Process

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on the revenue funding settlement and the budget setting process for 2022-23 and highlighted the following:

- The DfE had issued the revenue funding settlement for schools on 16 December 2021;
- In the Autumn of 2019, the Government announced its pledge to boost schools and high needs funding over a 3-year period - £2.6 billion in 2020-21, - £4.8 billion in 2021-22 (increase by £2.2bn) and £7.1 billion in 2022-23 (increase by £2.3bn). In addition, a further £700 million was pledged for high needs nationally in 2020-21, a further £730 million for 2021-22 and £780m for 2022-23;
- The DfE have continued to allocate school funding on the basis of the National Funding Formula (NFF) which should see all schools benefitting from the additional funding. Nationally, the Dedicated Schools Grant (DSG) shows an average increase of 3.2% in the pupil-led funding factors compared to 2021-22. The 2022-23 year is another "soft" year with Schools Forum still retaining its role in determining the school funding allocation methodology;

- The introduction of mandatory minimum per pupil funding levels for the 2020-21 year have been continued and the rates have increased for the 2022-23 year to £4,265 for Primary and an average of £5,576 for Secondary. The mandatory minimum per pupil funding levels represents a step towards the introduction of a 'hard' formula, where national rates must be implemented without allowing for local discretion;
- Following the (DfE) consultation in 2021, further guidance regarding a move towards a 'hard' formula is expected between now and 2024-25;
- The Minimum Funding Guarantee (MFG) threshold has been adjusted to ensure that all schools gain through the allocations per pupil and it is proposed that this be set at +2%;
- The Sparsity factor has seen the greatest changes of all formula factors. The NFF has increased the maximum sparsity values by £10,000, calculated sparsity distances based on road distances and applied a sparsity taper (making those eligible where the school has a sparsity distance 20% below the main threshold);
- Data for pupils who are eligible for FSM6 funding is now taken from the October census rather than the previous January school census';
- The low prior attainment data from 2019 would be used as a proxy for the assessments which would have taken place in 2020 and 2021 but didn't due to Covid;
- The DfE will pay business rates on behalf of all schools from 2022-23 removing the need for schools to pay their own business rates and then recover the funding;
- There was to be a slight uplift in rates of the Pupil Premium Grant with the numbers of those eligible being taken from the October 2021 census and not the January 2022 census;
- The provisional Dedicated Schools Grant (DSG) allocation for Wiltshire was £422,409,451m which was an increase of £16,067,591m compared with 2022-23;
- The overall uplift in 'real' funding for comparative purposes is 3.95%, split as Schools - 3.42%, Central – 1.52%, High Needs – 8.40%, Early Years – 1.08%;
- Pupil numbers had grown from 62,689 in 2018-19 to 64,246 in 2022-23 although primary numbers had dipped last year and for the current year;
- Included within the Schools Block funding of £328.593m is the amount of £1.913m allocated on the basis of pupil growth within Wiltshire;

- In 2021-22, the DfE stipulated that the funding awarded through the Teachers Pay and Pension elements must be excluded when considering any transfers between the Schools' Block and other Blocks. The requirement has been removed and any transfer would be based upon the Total Funding figure of £328.593m;
- October 2021 pupil numbers have been multiplied by a unit value of £35.96 and a headcount of 64,246 for calculating the funding for the central school's services block;
- The DfE continue with their commitment to reviewing the High Needs NFF and a consultation is proposed and due in the first quarter of 2022-23. The review should cover all factors of the High Needs NFF including the 'Historic Spend' factor and also the weightings applied to each factor;
- The early years indicative hourly rates give some uplift in the values paid through funding;
- The funding regulations do allow for a transfer of funding between the schools' block and other blocks within the DSG of up to 0.5% with the agreement of Schools Forum (this had been previously agreed);
- Local Authorities are required to submit their proposed delegated budget for schools in their areas by 21 January 2022 to the DfE who would then confirm the formula is compliant with the funding regulations. The DfE will then confirm the budgets to academies with the LA also needing to notify maintained schools of their budget shares by the end of February 2022; and
- It had been agreed by the maintained schools' representatives at the December meeting of Schools Forum that the de-delegation of services would continue in 2022-23.

An Early Years representative questioned if those smaller schools that were part of a shared site arrangement would be able to access the sparsity factor funding? Grant Davis outlined the rules around Sparsity funding and how the calculation used individual pupil's postcode information. Split-site schools would be eligible for Sparsity funding where they met the funding criteria, as defined in the NFF.

The Early Years representative questioned whether this was equitable in light of schools federating or joining as the combined school may not be entitled to Sparsity funding, despite one school being rural and small. Grant Davis confirmed that split site funding would still apply and if the combined school was eligible for Sparsity funding, then this would be paid in addition to the split site allowance.

Resolved:

That Schools Forum note the report.

56b Central School Services Block Update 2022-23

Marie Taylor (Head of Finance – Children and Education) referred to the report which sought to update Schools Forum on issues relating to the central school's block budget for 2022-23 and the decisions that would need to be made as part of the budget setting process. Marie highlighted the following:

- The central school services block budget allocation was £2.604m and this had been calculated using the NFF which applies a unit value of £35.96 to the pupil numbers from the October 2021 census. Funding for historic commitments for 2022-23 is then added to the amount of funding generated by the formula to give the overall total CSSB;
- As allocations were published earlier than usual in July 2021 this budget was agreed in principle at the December 2021 meeting of the Forum;
- Schools Forum approval is required on a line by line basis for the group of services which are funded from central schools' block
- Section A related to copyright licences and no decision was required by Schools Forum;
- Section B related to services previously funded by the Education Services Grant (ESG) and the additional pension costs of centrally retained teachers. Pay inflation at 2% was provided as a best estimate; and
- Section C related to historical commitments with the overall total of £0.293m being allocated.

Resolved:

That Schools Forum note the change to the copyright licence cost for 22-23 and reduction in the contribution to the high needs block in the report from the previous financial year and the required decisions to the central school's block budget for 2022-23 later in the meeting when all information has been received.

56c High Needs Block Update - 2022-23

Marie Taylor (Head of Finance – Children and Education) referred to her report which sought to update Schools Forum on issues related to the high needs block and the decisions that would need to be made as part of the budget setting process for 2022-23 and highlighted the following:

- The budget proposal for the high needs block was approved in principle at meeting on 9 December 2021 and that the only changes since this are the now confirmed planned places for September 2022 and the DSG management plan in discussion with the DfE;

- The high needs block allocation is £62.691m (which is an uplift of £5.161m – 8.97% on 2021-22). In addition to the allocation, a later supplementary allocation of £2.415m had been added and this was to fund the cost burden of the health and social care levy and other cost pressures;
- Estimated contract inflation of 4% for 2022-23 had been added and a 2% pay inflation for SEN teams;
- £1m had been allocated to a temporary support fund to tackle the SEN waiting lists in schools and £100k was added to increase the Day 6 provision to reduce the risk of exclusion in primary schools;
- An increase to the Inclusion Support Fund (ISF) was proposed to be funded by the high needs block at £180k in addition to the funding for the ISF from the early years block;
- There was an estimated funding shortfall of £11,160m and it was anticipated that there would continue to be an overspend in 2022-23;
- The DfE had allocated an amount of £325m as supplementary funding - £2.415m of which had been allocated to Wiltshire. This was extra funding that recognises the additional costs that local authorities and schools will face in the coming year, which were not foreseen when the original high needs block allocations were calculated, including the Health and Social Care Levy. Due to the lateness of this supplementary funding – detailed modelling had not taken place and Officers met with South West peers on 12 January to discuss and share modelling ideas;
- The preferred approach was to set up interim arrangements supporting specialist planned places for 12 months during 2022-23 as well as allowing for increases in externally commissioned provision. This would allow more time for consultation with schools and parent carers via the Wiltshire Parent Carer Council. The proposal would be a banding review with the supplementary funding increasing the ongoing base budget available for distribution.;
- It was proposed to apply 3% to Special Schools overall funding, to apply 2% to mainstream specialist places and apply in addition to current top up rates and named pupil allowances to take into account the schools block supplementary funding. It was highlighted that special schools had not received any funding increase for some time. Also it was proposed to add 3% to the value of secondary alternative provision service level agreements, to increase further education top up budget by £1.038m and allocate 2% to offset externally commissioned fee increases; and
- The management plan was still being drafted and had been delayed due to staff shortages. When officers had had the opportunity to meet with

the DfE they would bring the plan back to the Forum and would include the DfE's views and commentary.

An early year's representative commented that she appreciated the approach that the local authority had taken with regard to the supplementary funding and asked if the funding would apply to actual place numbers or planned place numbers in Special Schools and High Needs settings.

Marie Taylor reported that this Supplementary Funding was awarded based upon High Needs records held by the DfE and that the funding was a fixed finite pot and therefore apportioning the funding would need to be contained within the cash envelope quantum. She suggested that the September 2022 actual pupil data would be a sensible point in time

The early years representative asked if a threshold % increase would be considered so it was less burdensome for schools?

The Chair reported that funding was determined using a 'moment in time' with regard to learner and place numbers and therefore we should stick to applying funding on this basis and stick with it.

Marie Taylor added that they could look at having an exception – however the total quantum would remain fixed - it was agreed there may need to be a small sum available for exceptions where numbers of children increased significantly after September 2022.

The maintained primary special school governor representative appreciated that special schools would be benefiting from some of the supplementary grant funding and reported that they had been struggling along with no recent funding increases and certainly did not have the large reserves that some schools have to fall back on.

Resolved: That Schools Forum

- 1. Note the pressures on the high needs block for 2022-23 and the potential options to reduce the shortfall against high needs budgets including agreeing a transfer from Schools Block to balance the high needs pressures.**
- 2. Note the continuation of recovery actions feeding into the DSG Management Plan and that this will be brought to a future Schools Forum meeting as part of the High Needs Recovery update report.**
- 3. Approve the approach to deploy supplementary funding in 2022-23 and including future funds into a banding review planned to start this year.**

56d Early Years Block Update 2022-23 (Indicative Allocations)

Marie Taylor (Head of Finance – Children and Education) referred to the report which sought to update Schools Forum on issues related to the Early Years block for 2022-23 and the decisions that would need to be made as part of the budget setting process and highlighted the following:

- In his 2021 Spending Review, the Chancellor announced a number of national increases to increase early years entitlements. For 2022-23 this would be £160m and this included uplifts to the 2, 3 and 4 year old rates as well as uplifts to the disability access fund and pupil premium. The provisional early years block settlement for Wiltshire for 2022-23 was £28.521m;
- The allocations for the free entitlement for 3 and 4 year olds and 2 year olds are based on the January 2021 census and would be updated during the 2022-23 year for the January 2022 census;
- The *operational guidance for early years entitlements: local authority funding of providers 2022-23* was published in December 2021 and this contained a number of key points for the local authority to include when they were funding their providers;
- The Early Years Reference Group met on 5 January 2022 and considered a number of funding options attached as Appendix 1. The consensus of the group was to support the local authority recommendation of option 3, to passport in full the 2-year-old disadvantaged rate of £5.69 per entitled hour an increase of 21p on the previous year and to set the 3 and 4 year old rate at £4.42 per entitled hour, an increase of 17p per hour on the previous year whilst providing a minimum of £50,000 contingency to absorb any increases in children throughout the 2022-23 financial year;
- The Disability Access Fund is payable as a lump sum once a year per eligible child. If a child is splitting their entitlement between two or more providers, then parents should be asked to nominate the main setting. If a child receiving DAF moves from one setting to another within a financial year the new setting is not eligible to receive DAF for this child within the same financial year; and
- Appendix 2 to the report were the calculations of compliance with a worked example showing 98.3% of pass through. All demonstrated options would also have been compliant.

An Early Years representative expressed his thanks for the work of the Finance Team and for the agreement of option 3 of the funding of the rates. He also asked that the Council make representatives to the DfE to ask them to consider paying the business rates of nurseries/early year settings on a de-delegated basis as they will now be doing for maintained nurseries in schools for

consistency. Marie Taylor agreed to consider the implications of this and raise with colleagues.

Resolved: That Schools Forum

- 1. Note the update on the early years block and proposals in relation to the early years single funding formula and percentage pass through to providers:**

Local Authority preferred proposal:

- i) to increase the current rate of 2-year-old funding to £5.69 and 3 & 4-year-old funding to £4.42 per hour.**
 - ii) Pay inflation be added at 2% to the central early year's teams**
- 2. Note that all other funding factors remain at current 2021-22 levels or, funded levels.**
 - 3. Agree the early years block is to fully fund the Early Years Inclusion Fund at the current level and the high needs block to allocate £0.180m to increase support available in line with the SEN strategy around prevention.**

The Forum agreed to suspend the meeting at 3.02pm for a comfort break. The meeting reconvened at 3.07pm.

56e Schools Block Update 2022-23 (Delegated Budget)

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on issues relating to the schools delegated budget for 2022-23 and the decisions that would need to be made as part of the budget setting process and highlighted the following:

- The DfE had allocated a schools' block quantum to Wiltshire of £328.593m – this included funding of £1.913 million for the growth fund, based on the growth formula;
- The changes to the Sparsity factor were shared with Schools Forum in October 2021 and an 'in principle' decision was agreed to implement the NFF methodology and funding values;
- Modelling work has been prepared to calculate individual school budgets based on the proposed formula which was broadly similar to the formula for 2021-22 but the following changes should be noted:
 - An increase in Pupil and School led funding values of 3%
 - Minimum Funding Guarantee to be set between 0.5% and 2.0% to ensure all schools see a gain in funding on their pupil led funding (2% is proposed for 2022-23)

- Maximum Sparsity funding being increased by £10,000 in both Primary and Secondary schools to £55,000 and £80,000 respectively to support small and rural schools
 - Sparsity distances to be measured using road distances rather than 'as the crow flies' and applying a distance taper for schools within 20% of the distance threshold
 - Increases in the minimum per pupil funding levels (MPPFL) to £4,265 and £5,525 in primary and secondary schools
- Initial modelling suggests that the NFF is fully affordable for all schools in Wiltshire;
 - Since the introduction of the NFF the intention has been to try and move to replicate the formula in the 'soft' years. Where the NFF values could not be afforded, the Free School Meal Ever6 (FSM6) factor was compromised to ensure the other factors were affordable – for the last three years the formula had been fully affordable;
 - Growth allocations for 2022-23 are based upon pupil growth data from the October 2021 census and the October 2020 census. Criteria for growth was agreed at the December 2021 meeting of the Forum. £1,913m was allocated from the DfE for the 2022-23 growth fund. The growth of pupils was 340.5 for Primary and 633.5 for Secondary;
 - There were no plans to open any new schools in the 2022-23 year. The growth fund supports new primary and secondary schools with diseconomy costs for the first 7 years or until the school is full. The Basic Need Class Expansion for additional classes is still to be confirmed with colleagues in the School places team for the 2022-23 academic year. The Infant Class Size increases have been confirmed for 2021-22 with four schools being funded through this factor. Any surplus or deficit in the Growth Fund will form part of the overall DSG surplus or deficit balance;
 - Following the additional funding pledge, the DfE are seeking to ensure that all schools see an uplift in their calculated per pupil funding and have therefore proposed that the Minimum Funding Guarantee (MFG) is set at a positive figure of between 0.5% and 2.0%. Setting a positive MFG of 2% is fully affordable and will ensure that all schools see an uplift in their 'per pupil' funding of at least 2%. The cost to the formula in 2022-23 is less than £0.155m, subject to decisions taken by the Forum later in the meeting;
 - The DfE's consultation in the 2021-22 year, introduced a number of changes to the criteria for the NFF sparsity factor. Schools Forum considered a report in 2021-22 which set out the implications of these changes for Wiltshire and agreed to mirror the NFF within the Wiltshire formula for 2022-23;

- As part of the DfE's proposals to support small and rural schools, the maximum sparsity value for primary schools was increased to £55,000 for Primary and £80,000 for Secondary schools. This would mean that 62 Primary and 4 Secondary schools would be eligible for £2,378,451 of funding;
- The thresholds of the minimum per pupil funding levels (MPPFL) in primary and secondary schools for 2022-23 are £4,265 and £5,525 for primary and secondary respectively. These values include the previous Teachers Pay and Pension Grants which were incorporated into the AWPU funding values from 2021-22; and
- The overall funding allocated through the MPPFL is £4.953m in 2022-23, a decrease of £1.623m on the 2021-22 figure of £6.576m.

The Salisbury Diocesan representative commented that whilst the additional sparsity funding was welcome it was of note that sparsity funding was taken account of in MPPFL's and schools would see an increase in sparsity and this may impact upon a schools eligibility for any MPPFL funding. The Sparsity funding will be a real boost for a number of Wiltshire's small rural schools which are also suffering from the falling birth rate too.

Grant Davis agreed that sparsity fund is well received but highlighted that the that the majority of those schools that receive the MPPFL uplift are larger schools and that most smaller schools were not eligible for MPPFL funding.

Resolved that Schools Forum:

- 1. Note the schools block update report.**
- 2. Agree to apply all the funding factors at the 2022-23 NFF rates.**
- 3. Note the impact of the Sparsity factor.**
- 4. Agree to set the Minimum Funding Guarantee at a level of +2.0%.**
- 5. Agree that the Growth fund be set at £0.725m.**

(The decisions numbered 2-5 above were made later in the meeting under Agenda item 9).

56f Schools Supplementary Grant 2022-23 - Funding and Methodology

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum and outline the level of additional funding and how it would be allocated to schools in the 2022-23 year and highlighted the following:

- Schools Forum had previously been advised of additional funding being made available for the 2022-23 year and now that the detail of that

funding had been received;

- In Autumn 2021, the Governments spending review confirmed an additional £1.6bn funding for schools and high needs, in addition to the previous funding pledges. Of the additional funding, £1.2bn has been allocated to schools in support of the costs of the Health and Social Care Levy (employers National Insurance increase of 1.25%) and the wider cost pressures in schools;
- This supplementary grant would be paid to all maintained schools and academies from 1 April 2022;
- For the 2022-23 year this would be paid as a supplementary grant and from 2023-24 this would be baselined into the core income;
- Funding rates have been differentiated between early years pupils in maintained nurseries, mainstream 5-16 year-old pupils and post-16 pupils, with the bulk allocated to the mainstream 5-16 year-old pupils;
- Funding would be allocated using the following three elements, which are already key components of the NFF, using data from the October 2021 census:
 - o A basic 'per pupil' rate based upon the 'key stages'
 - o A lump sum paid to all schools (irrespective of size) - £3,680
 - o A per pupil rate for FSM6 pupils (different rates for primary and secondary)
- This funding would cover the increases in National Insurance (Health and Social Care Levy) and other cost pressures coming through such as inflation and unknown elements for pay awards going forward. This was extra funding and helpful for schools.

An Early Years representative asked who the early years funding was payable to? Grant Davis confirmed that maintained nurseries would receive this funding.

Resolved:

That Schools Forum note the report.

57 **School Budget Decisions 2022-23**

As this was a virtual meeting, the Chair suggested that it may be easier for Forum Members to use the 'raise your hand' function in Microsoft Teams if they were not in agreement to the decisions which were to be made in accordance with the Decisions matrix sheet.

The Chair led the Forum through the Decision Matrix and the decisions as detailed below were made:

Resolved: That Schools Forum

Overall budget

- 1. Agree to set the overall Schools Budget at the level of the DSG Settlement – namely £422,409,451.**

Central Schools Services Block

- 2. Agree as follows the Section B expenditure for the Central Schools Services:**

i) Education Welfare Service	£0.203 million
ii) Asset Management	£0.189 million
iii) Statutory/Regulatory duties	£0.682 million
iv) Admissions	£0.447 million
v) Servicing of Schools Forum	£0.003 million
vi) Centrally retained Teachers additional pension costs	£0.110 million

- 3. Agree as follows the central spend on historic commitments (Section C):**

- i) Funding for LAC Personal Education Plans be funded at £0.103 million;**
- ii) Funding for Child Protection Officer in Schools Adviser at £0.058 million; and**
- iii) Prudential Borrowing at £0.133 million.**

- 4. Note the Local Authority Decision (Section A) to set the budget at £0.409 million for central copyright licences for 2022-23.**

- 5. Note that these allocations allow a transfer of £0.227 million to support the high needs block.**

Schools Block – Delegated Budget

- 6. Agree to apply all the funding factors at the 2022-23 NFF rates.**
- 7. Agree to note the impact of the Sparsity factor and the increased number of schools now eligible.**
- 8. Agree to set the Minimum Funding Guarantee at a level of +2.0%.**
- 9. Agree that the Growth fund be set at £0.725 million split as £0.1 million Infant Class Size and £0.625 million basic need.**
- 10. Agree to transfer up to a maximum of £1.642m (0.5%) from School's block to High Needs block.**

11. Agree that the budgets for De-delegation of central services be as follows:

i) Access Budget Software	£54,646
ii) FSM Eligibility	£28,917
iii) Trade Union	£70,000
iv) EMAS & Travellers	£564,508 (Primary only)
v) Behaviour support	£664,669 (Primary only)
vi) Maternity supply	£571,124
vii) School Improvement	£229,614*

12. That agreement for the de-delegation of 11 vii) above is given by the maintained Primary Heads representatives present subject to there being a review of School Improvement services in the ensuing year.

High Needs Block

13. Agree that top up values for Named Pupil Allowances, Extended Learning Programmes, Resource Bases and Special Schools are to remain at the 2021-22 values and note the proposed consultation and review of High Needs formula proposed for the first quarter of 2022-23.

14. Note the pressures on the high needs block for 2022-23 and the potential options to reduce the shortfall against high needs budgets including agreeing a transfer from Schools Block to balance the high needs pressures.

15. Note the continuation of recovery actions feeding into the DSG Management Plan and that this will be brought to a future Schools Forum meeting as part of the High Needs Recovery update report.

16. Provide views on the approach and approve the approach to deploy supplementary funding in 2022-23 and include this in the proposed banding review starting this year.

Early Years Block

17. Agree to increase the current rate of 2-year-old funding to £5.69 and 3 and 4-year-old funding to £4.42 per hour.

18. Note that pay inflation will be added at 2% to the central early years' teams.

19. Note that Inclusion Support Fund be set at £0.357 million as in the 2021-22 year and agree that the early years block to fund the Inclusion Support Fund at £0.180 million to increase support available in line with the SEN strategy around prevention.

20. Agree up to £800 per child for 2022-23 from the Disability Access Fund – the local authority to passport the funding.

21. Agree that if any significant increase in DfE funding be notified, the Early Years Inclusion fund should be increased accordingly during the financial year, to ensure that at least 95% of funding is passed through to providers.

58 Confirmation of Dates for Future Meetings

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

17 March 2022 (if required)

9 June 2022

6 October 2022

8 December 2022.

59 Urgent Items

There were no urgent items.

(Duration of meeting: 1.30 - 3.52 pm)

The Officer who has produced these minutes is Lisa Pullin, Tel 01225 713015 or email committee@wiltshire.gov.uk of Democratic Services

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

Early Years Reference Group Meeting

Thursday 31 March 2022

1-2.50pm

1. Welcome and introductions

Lucy-Anne Bryant (LAB), Lyssy Bolton (LB), Jane Boulton (JB), Rosemary Collard (RC), Emma Cooke (EC), Jackie Day (JD), Sarah Hawkins (SH), John Proctor (JProctor) - CHAIR, Maggs Ritson & Karen Pollard (MR&KP - childminders), Marie Taylor (MT) (Left at 2pm), Emily Wood (EW) – NOTES

2. Apologies

Jo Clark – Rainbow Early Years, Clare Shipley and Jo Provis – SEND LWs, Russ Martin – Children Centres (Spurgeon's), Deborah Muir – Warminster School

3. Minutes of last meeting (5 January 2022)

Agreed as true record.

4. Matters arising

List of private nurseries – still to happen.

Action: EW to provide list of private nurseries

Cate Mullen as agreed to top-up the ISF to cover those families eligible for 30 hours

Recruitment issues – see item 8.

EYRG – new chair sought. EW to action – urgently as JP wishes to step down from this position in September.

Action: EW to send out invitation to the sector for a new EYRG chair

Schools Forum representation – LB suggested that her school business manager could attend in her absence. All agreed that this would be acceptable.

5. Budget update 21-22 (MT)

MT shared budget and year's forecast showing an underspend in 3–4-year-old funding (note as per the usual DfE funding arrangements this will be recouped by the DfE). But a small overspend in 2 year old disadvantaged children payments.

Also noted was an underspend in DAF funding, which may be because children have not been assessed for DLA during the pandemic.

6. DfE Support for hyper inflation and National Insurance changes in Schools Block and High Needs Block 22-23 (MT)

Additional supplementary grant has been awarded to Wiltshire to support Schools funding and SEND provision, 3% uplift to has been allocated to special schools funding and 2% to support pupils with SEND in mainstream schools. Early Years have not received an increase. When the DfE were challenged as to why early years were excluded, the answer was that our recent funding rate increase included the uplift. Disappointment expressed by the group.

JP encourages that members lobby their MP and professional groups to promote the needs of the EY sector.

7. Financial situation for nurseries (JProctor)

JP asked for general examples of financial strain experienced by providers. It was unanimously agreed that the situation is very challenging.

EC commented that settings are reporting weekly that they are having to close, if not rooms the whole provision. Springboard have reviewed their personnel policy to look at T&Cs to attempt to lower costs. JP asked what evidence providers are asking if colleagues are off sick with Covid? Answer – it's down to trust, staff are allowed to self-certify for first 5 days. RC reported that 2 local independent schools to her provision are asking their staff who test positive but are asymptomatic to continue to work but to wear masks. Newsletter guidance around managing the next phase of 'living with Covid' will be included in tomorrow's newsletter. DfE sent out update at 10:45am this morning ahead of changes to regulations tomorrow.

8. Staff recruitment (JProctor)

Recruitment issues:

EC reported that conversations are starting to happen around supporting care leavers to enter Early Years. LB reported that Kickstart hasn't proved popular to recruit and is now closed. MT asked if social media is being exploited, not yet but work is in progress. SH and LB are considering withdrawing places (especially 2-year-old places) as recruitment situation is dire. LAB reported that the council are about to issue a county-wide survey to assess the overall situation and will share our findings with the DfE. In the meantime, it's expected that one solution the DfE may offer is a relaxation with the ratios, but this will be counterproductive as existing staff may feel less prepared to continue under increased responsibility and burden. RC contributed that she felt apprenticeships were too long and too hard, to combine work and study leads to burn-out. Snapdragons have closed their children's waiting list until Sept 23 because of staff shortages. Staff leave and can't be replaced. JD – new qualification list has caused upset where staff have found that their qualification is now no longer relevant and cannot be used in ratios – examples are sought and to be sent to EC to forward to the DfE.

Action: EC to send list of queried qualifications to DfE

SH query – could the £3k graduate leadership fund be reinstated? Unlikely.

LB - Suite of professional qualifications that her school trust uses are introducing two new qualifications in September, one being a Leaders of Early Years. These NPQs are free, LB asked how are these were going to be delivered and when? The timings of introducing would ideally fit into teaching staff appraisals cycles and ideally start in October to fit into academic year.

Action: EC to send out information on NPQEYL

9. Service from Ofsted (JProctor)

South Hills have recently battled with Ofsted with registering a new lead person for one of their provisions. The process took 12 weeks and South Hills were not filled with confidence into the abilities of Ofsted personnel dealing with the request. JP asked if this has been a problem for anyone else. No other experience was shared.

Action: LB to report South Hills' experience back to the regulatory team that she sits on.

10. Homes for Ukraine scheme (LAB)

Wiltshire currently is aware of 8 Ukrainian children about to join EY provision – dispersed across the county. The 'Homes for Ukraine' scheme comes with additional funding on top of EYE funding to support the needs of these children. Providers need to email earlyyears@wiltshire.gov.uk so we can provide the necessary support. Children who come as part of Ukraine Family Scheme do not attract additional funding and it is not known when these families are arriving or where to. Case workers will be supporting each case.

EC updated the group with information on some of the cultural differences to be experienced between Ukrainian and Afghan refugee children. In the Ukraine, formal education doesn't start until 7 years old. The environment for 5,6 and 7 year olds coming to the UK may be very different to what they are used to. However, most Ukrainian children do access formal early years so will expect to take up a place.

We still have some Afghan families living in a remote hotel in the north of the county. They are placed here by the Home Office and are often larger families with extended family members which lack transport. They have been reluctant to take-up the free childcare on offer as they do not use formal childcare in Afghanistan.

11. Review of Terms of Reference (LAB/AII)

Remove the term 'free' and replace with EYE where appropriate.

Remove LA Primary schools and to just state 'Primary Schools' to allow for Multi-Academy Trust representation.

"Task and finish" to be added to purpose for ad hoc situations as they arise eg covid, refugee support etc.

Under membership: replace School's Forum Chair with EYRG Chair.

We need to check if representatives are proportionate for the number of categories listed.

Action: EW to assess numbers of representatives required for each category against the number of children accessing that provision.

Include the principle that membership could be renewed for a second term.

Final draft to be emailed to members for sign-off before the summer term break.

Action: LAB to make amendments and send to EYRG by end of April for the group to review.

12. Any other business

New Qualification List – Training Provider name needs to be included in info to EC.

8 February

COVID is still have a huge impact upon settings in the following ways:

- stress of staff numbers
- sick pay
- constant relation
- long Covid
- impact on sickness management

Integrated Two Year Old Check

EC reported that she's been working with health to revisit the process of 2 year old checks. A flow-chart and a 9-page guidance document created in collaboration with health visitors were shared with members. It's acknowledged that there is a mix of experience and depth of relationships

between providers and health workers across the county – some areas are stronger than others. The documentation will be checked and modified by the council's branding team to ensure that the material meets accessibility rules and is grammatically correct etc.

Action: EC will share this next version with members for their ratification before it's circulated to all providers.

High Needs Places

LB raised the concern around the shortfall in Resource Base and special school places, especially in the west. The finance and admission processes need to be fully considered as there appears to be a lack of long-term strategic oversight. JP reported that Christ the King in the south of the county have lots of room and could be used to develop additional Resources Bases. Matt Look in developing new resource base places in readiness for this September.

13. **Date and time of next meeting** (19 September 2022, 1-2.50pm) [Click here to join the meeting](#)

Schools Forum
School Funding and SEN Working Group
MS TEAMS MEETING
23rd May 2022
Minutes

Present: Marie Taylor (Chair), (Finance, local authority ((LA)), Grant Davis (Finance, LA), Cate Mullen (Head of Inclusion & SEND, LA), Helean Hughes (Director LA), Lisa Percy (Chair of SF / Hardenhuish), Sam Churchill (Hilmarton) Graham Nagel-Smith (Morgan’s Vale & Woodfalls), Andy Bridewell (Ludgershall Castle),

Apologies: Simon Thomas (LA), Gary Binstead (LA), John Hawkins (Teacher / Governor rep), Catriona Williamson (Mere) Rebecca Carson (Woodford Valley) Georgina Theobald-Kiely (Downland) Graham Shore (Deputy Chair SF / Holy Trinity)

1.	Welcome and Apologies MT welcomed the group to the virtual meeting.	
2.	Minutes These were checked as complete with no outstanding actions.	
3.	Matters Arising There were no matters arising.	
4.	Schools Funding (DSG) Budget Monitoring (MT) MT shared her report & appendices – highlights, underspends in EY will be adjusted for in June/July by the DfE. Schools block growth fund underspend offsets the HNB pressures. HNB pressures in line with demand for services and previous years demand patterns - recovery work in this area on going – Wiltshire hope to take up the DfE’s Developing Better Value programme offer when it becomes available, this has funding attached.	
5.	Schools Funding – DSG Budget Statement (MT) MT shared her report & appendices – highlighting the original DSG budget position including block transfers and agreed de-delegation together with the new Supplementary Funding which has allowed inflation linked increases to top ups and named pupil allowances (NPAs) for 2022-23. The allocation for HNB is unlikely to fully fund demand and early estimates of HNB are at £11m overspend which will push the DSG deficit reserve to £36m. Recovery actions covered with the HNB verbal update later in the agenda.	
6.	Verbal Update: High Needs Working Group (CM) CM updated the group on the costed provision map which has been developed alongside SENCOS. The map shows the funding and activity/ support and associated costs – the two should align. In order to evidence success, a dip sample will be carried out, including where changes to better reflect the learner’s plan have been recommended. CM went on to talk about new provision being commissioned under the “Places and Spaces” with SEMH provision continuing to be developed. and MT added that for every local school based specialist place, the potentially independent special; school (ISS) places were avoided.	

	HH briefed the group on the DfE developing better value (DBV) offer which the local authority are keen to engage with.	
7.	<p>F40 Update (GD)</p> <p>GD shared his report outlining the extensive and recent work of the f40. The majority of members are shire counties who, like Wiltshire are poorly funded in comparison to others. MT asked GD to remind us what the annual membership fee was (it's £750) and the consensus was this provided good value particularly as the f40 political lobbying focus in recent years had concentrated on SEN and this is a concern for many.</p>	
8.	<p>Consultations (GD)</p> <p>GD shared his report including the results from the NFF consultation (July – Sept 21) and the next stage from the DfE. As Wiltshire aligns closely with the NFF there are no issues however it will be interesting to see how the DfE develop their formulaic approach towards split site allowance, PFI, exceptional circumstances, growth & falling rolls fund. GD went on to explain how the DfE intended SF to have a role moving forward but that this would be more consultation around early years, SEND and de-delegation – uncertainties around continuance of de-delegation – <i>(GD can update at SF as new information has become available and a further 2nd Stage of Consultation will be released before the Summer 2022)</i></p> <p>GD then shared his local formula report to establish a set of questions for the autumn consultations to allow a longer lead in time for schools leaders to respond. As maintained schools convert to academies, the amount of funding available for central services will inevitably reduce and services will need to scale back. The traded model inevitably is more expensive as the financial risk of individual buyback levels is higher.</p> <p>For 23-24 financial year, education functions (School Improvement Brokerage & Monitoring grant) SIMB will be withdrawn by the DfE and SF will need to consider increasing the amount transferred from mainstream schools. In recent years SF have voted to transfer 0.5% to support high needs pressures and the long term recovery plan for change this will be included in the annual consultation. LP suggested a change of narrative around top ups as these had only just been increased and the national top up funding arrangements are largely unknown. GD to amend.</p>	GD
9.	<p>AOB (MT)</p> <p>Schools White Paper “Shaping the Future” – HH and Lesley Lowe have started looking at the SIMB (also known as LAMB) compared with chapter 4 of the white paper alongside primary and secondary / special heads. There is a meeting 24/6 to bring this work together and this will link into the Autumn consultation. The risk to a hybrid model is the unit price for schools which will need to increase to mitigate against uncertainty.</p> <p>SEN Review – SEN Board are preparing on a local area response which will be shared with schools and heads encouraged to respond. The local authority may do a separate response focussed around the financial risk of the DSG deficit reserve to the local authority. 22 questions – a huge range to consider. The closing date has been extended to the 22nd July 2022. HH said we need to feedback to the DfE that the last national change of this scale was moving from statements to EHCPS which was extremely challenging on schools and local authority staff time so the transition process from a local banding to a national banding scheme is likely to require a long lead in time.</p> <p>Household Support Fund – HH thought it would be useful for SF to have some general information around the scheme. MT to draft a report for SF</p>	MT
10	<p>Date and Time of Next Meeting</p> <p>The next Schools Forum meeting after our June meeting will be Thursday 6th October 2022 @ 1.30pm. This is planned as a virtual teams meeting.</p>	

	The date of the next meeting is scheduled for Monday 19th September at 8.30am . This is planned as a virtual teams meeting.	MT
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Wiltshire Council

Schools Forum Finance & SEN Working Group 23rd May 2022

Schools Forum 9th June 2022

F40 – Update for Members of Schools Forum

Purpose of report

1. To provide members of Schools Forum with an update on the membership of F40 and the current work of the F40 Group.

Background

2. The F40 is made up of 42 local authority members that are among the lowest funded for education from across England. It campaigns for fairer and increased funding in all areas of education, including primary and secondary schools, Early Years, 16-19, and High Needs (SEND) up to age 25. A list of current members is provided at the end of this report.
3. F40 seeks fairness and equal opportunities in education for all children, regardless of where they live and wishes to see all schools properly funded to enable them to provide a quality education that enables children and young people to reach their potential. The basic funding should be enough to run a school before extra money is added on for any additional needs specific to a school or its pupils.
4. Historically, education funding has been unfair in England for many years. While good progress has been made with the introduction of the National Funding Formula, there are still too many discrepancies locked into how schools are funded.
5. F40 believes that its wrong that schools very similar in nature receive very different levels of funding – purely because of their location. F40 appreciate there will always be a difference in funding between some schools in specific areas, such as London, but do not accept the extent of the variation.
6. F40 are also very concerned about the deepening SEND (Special Educational Needs and Disabilities) funding crisis, which requires bold and urgent improvements and additional funding to ensure the most vulnerable young people are provided with the best education and support.
7. At present, SEND funding is based on historic need and does not take into consideration the growing number of children with SEND or their increasing complexity of need. Funding has not kept pace with need, resulting in a £1 billion overspend in local authorities across England.

Appointments

8. The F40 has appointed a political representative from each of the major parties to play a leading role on f40's behalf in Parliament, helping to coordinate activities among MPs who represent f40 local authority members, and in raising issues around education funding in the House of Commons. The three members are.
 - Sir Gary Streeter MP (Conservative)
 - Layla Moran MP (Liberal Democrats)
 - Emma Hardy MP (Labour)
9. The current Chair of the F40 group is Cllr Alex Dale, who is also Cabinet Member for Education at Derbyshire County Council.

Recent Work

10. The F40 group has been working hard on behalf of its members and some of the recent activities include:
 - Briefing MPs on the 22nd of March 2022
 - Meeting the DfE's SEND team to discuss SEND review
 - 'Safety valve' discussions with the DfE around deficit SEND budgets
 - Meeting with Jon Andrews at the Education Policy Institute
 - Research into what fair education funding should look like
 - Responses to the Education white paper
 - Responses to the SEND review and green paper

Proposals

11. Schools' Forum notes the ongoing work of F40 on behalf of its members.

Report author:
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List of f40 Members



Bath & North East Somerset Council
Buckinghamshire County Council
Cambridgeshire County Council
Central Bedfordshire
Cheshire East Council
Cheshire West and Chester Council
Cornwall County Council
Derbyshire County Council
Devon County Council
Dorset Council
East Riding of Yorkshire Council
East Sussex County Council
Gloucestershire County Council
Hampshire County Council
Herefordshire Council
Kent County Council
Lincolnshire County Council
North Lincolnshire Council
North Yorkshire County Council
North Northamptonshire Council
Northumberland County Council
Oxfordshire County Council
Plymouth City Council
Shropshire County Council
Solihull Metropolitan Borough Council
Somerset County Council
South Gloucestershire Council
Staffordshire County Council
Stockport Metropolitan Borough Council
Suffolk County Council
Swindon Council
Torbay Council
Trafford Metropolitan Borough Council
Wakefield Metropolitan Borough Council
Warrington Council
Warwickshire County Council
West Northamptonshire Council
West Sussex County Council
Wigan Metropolitan Borough Council
Wiltshire Council
Worcestershire County Council
York (City of) Council

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Wiltshire Council

Schools Forum Working Group
23rd May 2022

Schools Forum
9th June 2022

DEDICATED SCHOOLS BUDGET – BUDGET MONITORING 2021-22

Purpose of the Report

1. To present the year end budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2021-22 as at 31st March 2022.

Main Considerations

2. Appendix 1 to this report outlines the budget monitoring summary as at 31st March 2022.
3. An overspend of £7.066 million is reported against the overall schools budget. This is an improved position than previously reported due to a slowing of plans. The main driver for the adverse variance is the on-going pressures on the high needs block, the reasons for these are known and understood. The detailed budget monitoring report is shown in Appendix 1 and highlights of each block outlined below.

Early Years Budgets (Budget £29.206m, final variance (1.881m))

4. Following COVID outbreak in March 2020, government expectations around opening of early years setting has seen much change. Most recently, from the Spring Term 2021, the government's expectation was that settings would remain open and will only be paid for children attending settings.
5. The Council has continued to use COMF funding to support settings with a range of schemes from a universal offer to support specialist kit and cleaning, COVID sickness, to lost private income to support the council's duty of sufficiency. The ringfenced sum for 2020-21 and 2021-22 was £1.6M. In addition, a new allocation was made available for flexible pastoral support for 2021-22 of £0.4M.
6. The variance on the budgets for the early years entitlement for 15- and 30-hours childcare for 2-, 3- & 4-year-olds is tabled below. It is likely some parents have concerns around infection control and are not taking up entitlements, there is a reduction in the take up for 2021 and the majority of this will be recouped in 2022-23 by the DfE in July. Disadvantaged 2-year-old take up is above planned and this is due to success with active promotion through Childrens Centres staff and health visitors.
7. There is a small underspend amount due to vacant posts within the entitlement and early years teaching teams.
8. The DfE have now made the 20-21 adjustment, and this is reflected in the early years DSG reserve.
9. The table overleaf shows an extract from Appendix 2, the volume variance analysis.

	Budgeted PTE	Actual PTE	PTE Variance	Budgeted Spend £M	Actual Spend £M	Actual spend Variance £M
3- & 4-year olds	10.619	9721	(898)	25.723	23.719	(2.004)
2-year-olds	781	828	47	2.438	2.549	0.110

10. The 20-21 adjustment based on the January 2021 census data was a decrease of £0.189 million. In addition, the 21-22 allocation increased by £0.989 million. This reflects a higher count of children than the previous year.

Schools Budgets (Budget £316.207m, variance (£0.945m))

11. The underspend on schools largely relates to the schools growth fund which is helping to offset the overall pressure on the DSG.

High Needs Budgets (Budget £59.695m, variance £9.723m)

12. High needs budgets are overspent by £9.723m. The biggest areas of overspend are named pupil allowances and top ups, particularly post 16, independent special school packages, and Wiltshire pupils in non-Wiltshire provision.

13. When the level of funding available does not match the local needs, the budget cannot be set at an achievable level and so the location of the overspend is not an indication of individual budget issues but that the whole block under significant pressure.

14. The major driver of the increased cost is volume. Activity (volume) is measured in FTE – full time equivalent pupils. Variance analysis is provided at Appendix 2. It is important to note that the number of EHCPs being requested has slowed slightly however this could be due to a number of factors including reduced access to and contact with pupils due to the COVID pandemic.

	Children with an EHCP in Wiltshire
<i>Number as at 1st April 2018</i>	<i>3,052 (233 - 8.27% increase on previous April)</i>
<i>Number as at 1st April 2019</i>	<i>3,456 (404 - 13.24% increase on previous April)</i>
<i>Number as at 1st April 2020</i>	<i>3,860 (404 - 11.69% increase on previous April)</i>
<i>Number as at 31st March 2021</i>	<i>4,105 (245 – 6.35% increase on previous April)</i>
Number as at 31st March 2022	4,368 (263 – 6.41% increase)

15. At outturn, it is also useful to look at the average unit price variances to indicate where spend per pupil type has increased.

16. The table below shows an extract from Appendix 2, the volume variance analysis showing the movement from budgeted average unit cost;

	Increase in budgeted unit weekly price (average) 20-21	Increase in budgeted unit weekly price (average) 21-22
Special School Top Ups	+ £487	+ £785
ELP To Ups	+ £1,228	+ £1,749
Resource Base Top Ups	+ £392	- £80
Named Pupil allowance	+ £434	+ £353
Independent Special School Fees	- £99 (reduction)	+ £784 (incl. TPP)
6 th Form / College Top Ups	+ £634	-£161
Inter authority	+ £476	+ £1,723
Alternative Provision & Direct Payments	+ £3,031	-£ 316

17. As Schools Forum are aware, much work has been done, over recent years to investigate and address the issues. The High Needs Group meets regularly to discuss the recovery actions and more detail on activity and progress is reported regularly in the High Needs update report.

DSG Reserve

18. The reserve brought forward of £18.717 million is adjusted by the negative early years block adjustment of £0.189 million. The overspend takes the reserve into an overall deficit position of £25.973 million.

DSG Reserve	Early Years Ringfence (effective 01-04-21)	Schools Block, HNB & Central	Total 21-22 FY
Balance brought forward from 20-21		18.717	18.717
Early Years Adjustment 20-21 prior year	0.189		0.189
Final variance 21-22	(1.881)	8.948	7.066
Estimated balance carried forward 21-22	(1.692)	27.665	25.973

19. With effect from 2018-19, the department tightened the rules governing deficits in local authorities' overall DSG accounts, under which local authorities must explain plans for bringing DSG account back into balance. The DfE required a report from any local authority that had a DSG deficit of more than 1% as at the end of any financial year.

20. With effect from 2021-22, the department further updated the rules governing deficits and expanded the requirements around deficits to include a DSG management plan workbook. The latest DfE DSG Management Plan has been shared with the recovery group at the last meeting.

21. Officers from Wiltshire and two other local authorities had a meeting with the DfE in March to learn more about the DfE's Development Better Value (DVB) programme and the assistance on offer from the national recovery resources.

Proposals

22. Schools Forum is asked to note the year end position budget monitoring position and the deficit DSG reserve balance as at 31st March 2022.

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Appendix 1 – Schools Budget Forecast Position as at 31st March 2022

a	b	c	d = (c-b)	e = (d/b)	f	d = (c-b)	g
Service Area	Current Annual Budget £m	Period 12 Outturn £m	Period 12 Outturn Variance £m	%	20/21 Outturn Variance	February forecast variance £m	Budget Move- ment from Previous Report
Three to Four Year Olds EY Entitlement Funding	25.723	23.719	(2.004)	-7.79%	-0.229	(2.000)	-0.004
Two Year Olds EY Entitlement Funding	2.438	2.549	0.111	4.54%	(0.162)	0.111	-0.001
Early Years Inclusion Support Fund	0.357	0.446	0.089	24.87%	(0.042)	0.000	0.089
Early Years Pupil Premium & DAF	0.266	0.218	(0.049)	-18.23%	(0.107)	(0.049)	0.000
Early Years Central Expenditure	0.422	0.393	(0.029)	-6.77%	(0.155)	(0.034)	0.005
Early Years Block	29.206	27.325	-1.881	-6.44%	-0.695	-1.971	0.089
Schools Budget Shares Primary & Secondary - Local Authority Schools	113.062	113.062	0.000	0.00%	0.000	0.000	0.000
Schools Budget Shares Primary & Secondary - Academy Schools	198.985	198.985	0.000	0.00%	0.000	0.000	0.000
Licences and Subscriptions	0.053	0.055	0.002	3.82%	(0.000)	(0.017)	0.019
Free School Meals	0.028	0.028	0.000	0.00%	(0.008)	0.000	0.000
Staff Supply Cover (Not Sickness)	0.619	0.528	(0.091)	-14.72%	0.000	(0.051)	-0.041
Behaviour Support Team	0.639	0.639	0.000	0.00%	0.000	0.000	0.000
Ethnic Minority and Traveller Achievement	0.543	0.482	(0.061)	-11.22%	(0.076)	(0.044)	-0.017
De Delegated Total	1.882	1.731	-0.150	-7.98%	-0.084	-0.112	-0.038
Growth Fund	2.278	1.483	(0.795)	-34.90%	(2.735)	(1.278)	0.483
Schools Block	316.207	315.262	-0.945	-0.30%	-2.819	-1.390	0.445
Special School Place Funding	8.062	8.062	0.000	0.00%	0.000	0.000	0.000
Resource Base (RB) Funding	1.972	1.972	0.000	0.00%	0.000	0.000	0.000
Enhanced Learning Provision (ELP) Funding	1.887	1.887	0.000	0.00%	0.000	0.000	0.000
High Needs Block (all schools)	11.921	11.921	0.000	0.00%	0.000	0.000	0.000
Named Pupil Allowances (NPA)	6.416	7.509	1.093	17.03%	2.684	1.170	-0.077
Special School Top-Up	8.251	9.915	1.664	20.17%	2.540	1.635	0.030
Resourced Base (RB) Top-Up	2.013	2.219	0.206	10.23%	0.621	0.257	-0.051
Enhanced Learning Provision (ELP) Top-Up	1.667	2.829	1.163	69.76%	0.896	1.217	-0.055
Estimate of Transitional Support (TSP) payments	0.000	0.459	0.459	#DIV/0!	0.000	0.421	0.038
Secondary Alternative Provision Funding	2.791	2.791	0.000	0.00%	0.025	0.000	0.000
Non Wiltshire Pupils in Wiltshire Schools	0.000	-0.029	(0.029)	0.00%	0.000	0.000	-0.029
Devolved to Maintained & Top Up Total	21.137	25.693	4.555	21.55%	6.766	4.699	-0.144
Wiltshire College Places	2.100	2.100	0.000	0.00%	0.000	0.000	0.000
Wiltshire Pupils in Non Wiltshire Schools	2.074	2.849	0.775	37.36%	0.520	0.757	0.018
Post-16 Top-Up	2.735	5.785	3.050	111.54%	1.484	3.674	-0.624
Independent & Non-Maintained Special Schools	11.846	13.473	1.627	13.73%	2.160	1.737	-0.110
SEN Alternative Provision, Direct Payments & Elective Home Education	2.290	2.598	0.308	13.46%	0.699	0.323	-0.015
Education Other than at School (EOTAS)	0.536	0.470	(0.066)	-12.28%	0.002	(0.057)	-0.008
Funding for Places outside Schools	21.581	27.276	5.695	26.39%	4.865	6.433	-0.739
High Needs in Early Years Provision	0.454	0.422	(0.032)	-7.05%	(0.032)	(0.032)	0.000
Speech & Language	0.566	0.551	(0.015)	-2.63%	(0.023)	(0.015)	0.000
SEND Business Support	0.088	0.088	0.000	0.00%	0.000	0.000	0.000
0-25 Inclusion & SEND Teams	2.539	2.339	(0.200)	-7.87%	0.000	(0.183)	-0.017
Specialist Teacher Advisory Service	1.138	1.007	(0.132)	-11.56%	(0.181)	(0.149)	0.017
Other Special Education	0.271	0.122	(0.149)	-54.84%	(0.148)	0.000	-0.149
Commissioned & SEN Support Services	5.056	4.529	-0.527	-10.42%	-0.384	-0.379	-0.148
High Needs Block	59.695	69.418	9.723	16.29%	11.247	10.754	-1.031
Central Licences	0.395	0.395	0.000	0.00%	(0.001)	0.000	0.000
Central Provision (Former ESG)	0.990	1.255	0.266	26.83%	(0.050)	0.000	0.265
Admissions	0.426	0.411	(0.015)	-3.45%	0.038	(0.002)	-0.012
Servicing of Schools Forums	0.003	0.003	0.000	0.00%	0.000	0.000	0.000
Central Provision within Schools Budget	1.814	2.064	0.251	13.83%	-0.011	-0.002	0.253
Education Services to CLA	0.103	0.022	(0.081)	-78.78%	(0.057)	0.000	-0.081
Child Protection in Schools & Early Years	0.056	0.056	0.000	0.00%	0.000	0.000	0.000
Prudential Borrowing	0.208	0.208	0.000	0.00%	0.000	0.000	0.000
Historic Commitments	0.367	0.286	-0.081	-22.09%	-0.057	0.000	-0.081
Central School Services	2.181	2.351	0.170	7.78%	-0.068	-0.002	0.172
Total Schools Budget	407.289	414.355	7.066	1.73%	7.664	7.391	-0.325
Pupil Premium (academy & maintained)	15.540	15.540	0.000	0			Academy & Maintained school (excl CiC)
6th Form Funding Maintained Schools (LSC Grant)	1.121	1.121	0.000	0			Maintained schools only
UI Free School Meal Grant Provisional (academy & maintained)	5.462	5.462	0.000	0			Provisional allocations
PE & Sports Revenue Grant (academy & maintained)	3.619	3.619	0.000	0			Allocation published 28/10/21
DfE Revenue Grants for all Wiltshire Schools	25.741	25.741	0.000	0			
TOTAL DfE SCHOOLS FUNDING	433.030	440.096	7.066	1.63%			

Appendix 1 - the service forecasts of expenditure throughout the year and actual net expenditure at year end

Appendix 2 - planned and actual activity in FTE (full time equivalent pupils) a this is a measure of volumes of pupil placements / support arrangements

Appendix 2 - Variance Analysis

<i>h</i>	<i>i</i>	<i>j</i>	<i>k = (j-i)</i>	<i>l = (k/i)</i>	<i>m</i>	<i>n</i>	<i>o</i>	<i>n</i>	<i>o</i>	<i>p</i>
Volume analysis	Budgeted Activity FTE	Period 12 Outturn Activity FTE	Period 12 Outturn Variance FTE	Outturn Variance %	20/21 Outturn Volume	Volume movement from Previous Report	Forecast Average Prices	20/21 Actual Average Prices	Unit	Movement from Previous Report
Three/Four Year Olds	10,619	9,721	(898)	-8%	9,938	- 2	£4.25	£4.20	p/hr	
Two Year Olds	781	828	47	6%	774	-	£5.48	£5.40	p/hr	
ISF	0	0	0	0%	0	-				
							£615	£615	pa	
							£0.53	£0.53	p/hr	
Early Years Block ACTIVITY DRIVER DATASET	11,400	10,549	(851)	-7%	10,712	- 2				
Sp Sch Place Funding	806	806	0	0%	1,094	0	£10,000	£6,546	pa	
RB Funding	329	329	0	0%	460	0	£6,000	£4,200	pa	
ELP Funding	315	315	0	0%	594	0	£6,001	£3,213	pa	
	1,449	1,449	0	0%	2,148	- 1			pa	
NPA	1,120	1,204	84	7%	1,042	46	£6,235	£5,661	pa	
Special School Top-Up	779	872	93	12%	778	4	£11,370	£10,327	pa	
RB Top-Up	342	383	40	12%	351	9	£5,800	£5,736	pa	
ELP Top-Up	360	444	84	23%	317	0	£6,374	£4,512	pa	
TSP		106	106	0%	-	11	£4,000	£0	pa	
	2,603	3,009	406	16%	2,487	- 40	£8,539	£7,821	pa	
Wiltshire College Places	350	350	0	0%	350	-	£6,000	£6,000	pa	
Non Wiltshire Schools	181	216	35	19%	177	0	£13,196	£11,193	pa	
Post-16 Top-Up	253	544	291	115%	394	2	£10,629	£10,526	pa	
Ind & Non-Maint Sp Sch	231	259	28	12%	214	8	£52,022	£49,988	pa	
SEN AP, DP & EHE	170	197	27	16%	164	5	£13,185	£13,501	pa	
	1,185	1,566	381	32%	1,300	- 5	£17,415	£17,245	pa	
High Needs Block ACTIVITY DRIVER DATASET	5,237	6,024	787	15%	5,935	- 46	£11,523			

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

Wiltshire Council

Schools Forum Funding & SEN Working Group
23rd May 2022

Schools Forum
9th June 2022

DEDICATED SCHOOLS BUDGET – BUDGET STATEMENT 2022-23

Purpose of the Report

1. To present the budget statement for the Dedicated Schools Grant (DSG) for the financial year 2022-23.

Main Considerations

2. Appendix 1 to this report outlines the budget summary as at 30th April 2022.
3. It is currently too early in the financial year to present an evidenced forecast of expenditure; however, it is likely that the pressure on the high needs block will be in line with increases in demand from recent years which are 6% for 2021-22 and 2020-21.

Early Years Budgets (Budget £28.521m)

4. The table below shows the funds allocated for 2022-23 – this is the provisional allocation which is updated by the Department for Education (DfE) in the summer.

	Budgeted PTE	Budgeted Rate	Budgeted Spend £m
2-year-olds	671	£5.69	2.175
3- & 4-year-olds	10,024	£4.42	25.254

5. This was not increased by a supplementary grant due to the national increases to the hourly rates and other funds. The ISF has been extended to 30 hours from 15 for 22-23 as part of the preparation for school programme within the high needs recovery plan.

COMF Grant Funding

6. Unspent COMF grant will be available for 2022-23.

Schools Budgets (Budget £328.594m)

7. The schools budgets were increased, in addition, schools have been allocated schools supplementary grant to alleviate increases in energy, national insurance and other costs. Following consultation, transfers of 0.5% was agreed from the schools block to support the high needs block and an amount equivalent to the 50% reduction in the school improvement brokerage and monitoring grant in January 2022 to replace the removal of this funding.

High Needs Budgets (Budget £65.105m)

8. High needs budgets have been set within the grant allocation. The estimates of requirement for 2022-23 exceeded this at the time of setting the budget by £11.160m.
9. When the level of funding available does not match the local needs, the budget cannot be set at an achievable level which inevitably creates a transfer to the DSG deficit reserve at year end.

Central Schools Services (Budget £2.604m)

10. The historical element of this block has been reduced by 20% in line with recent years despite this a limited sum continues to be transferred to support the high needs block.

DSG Reserve

11. The reserve brought forward of £25.973 million – prudent estimate of movement this financial year would be an increase in line with the original budget estimate; £11.160m leading to a £37.133m position at the end of the financial year, it is hoped that the on-going work of the high needs recovery group will mitigate this to a degree however, the impact of the majority of schemes is longer term.

Proposals

12. Schools Forum is asked to note the original dedicated schools budget statement and balance brought forward on the DSG reserve.

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Appendix 1 – Schools Budget as at 30th April 2022

61.353 4.9082752 23.091 0.9236492

a	b	c	d = (c-b)	e = (d/b)	f	d = (c-b)	g
Service Area	Current Annual Budget £m	Period 1 Forecast £m	Period 1 Forecast Variance £m	%	21/22 Outturn Variance	April forecast variance £m	Budget Move- ment from Previous Report
Three to Four Year Olds EY Entitlement Funding	25.254	25.254	0.000	0.00%	(2.004)	0.000	0.000
Two Year Olds EY Entitlement Funding	2.175	2.175	0.000	0.00%	0.111	0.000	0.000
Early Years Inclusion Support Fund	0.357	0.357	0.000	0.00%	0.089	0.000	0.000
Early Years Pupil Premium & DAF	0.305	0.305	0.000	0.00%	(0.049)	0.000	0.000
Early Years Central Expenditure	0.430	0.430	0.000	0.00%	(0.032)	0.000	0.000
Early Years Block	28.521	28.521	0.000	0.00%	-1.885	0.000	0.000
Schools Budget Shares Primary & Secondary - Local Authority Schools	113.356	113.356	0.000	0.00%	0.000	0.000	0.000
Schools Budget Shares Primary & Secondary - Academy Schools	210.453	210.453	0.000	0.00%	0.000	0.000	0.000
Education Functions	0.230	0.230	0.000	0.00%	0.000	0.000	0.000
Licences and Subscriptions	0.055	0.055	(0.000)	-0.17%	0.002	0.000	-0.000
Free School Meals	0.029	0.029	0.000	0.00%	0.000	0.000	0.000
Staff Supply Cover (Not Sickness)	0.641	0.641	0.000	0.00%	(0.091)	0.000	0.000
Behaviour Support Team	0.665	0.665	0.000	0.00%	0.000	0.000	0.000
Ethnic Minority and Traveller Achievement	0.565	0.565	0.000	0.00%	(0.061)	0.000	0.000
De Delegated Total	1.954	1.954	-0.000	0.00%	-0.150	0.000	-0.000
Growth Fund	0.973	0.973	0.000	0.00%	(0.795)	0.000	0.000
Schools Block	326.966	326.966	-0.000	0.00%	-0.795	0.000	-0.000
Special School Place Funding	8.620	8.620	0.000	0.00%	0.000	0.000	0.000
Resource Base (RB) Funding	2.010	2.010	0.000	0.00%	0.000	0.000	0.000
Enhanced Learning Provision (ELP) Funding	1.803	1.803	0.000	0.00%	0.000	0.000	0.000
High Needs Block (all schools)	12.433	12.433	0.000	0.00%	0.000	0.000	0.000
Named Pupil Allowances (NPA)	7.141	7.141	0.000	0.00%	1.093	0.000	0.000
Special School Top-Up	8.293	8.293	0.000	0.00%	1.664	0.000	0.000
Resourced Base (RB) Top-Up	1.982	1.982	0.000	0.00%	0.206	0.000	0.000
Enhanced Learning Provision (ELP) Top-Up	2.420	2.420	0.000	0.00%	1.163	0.000	0.000
Estimate of Transitional Support (TSP) payments	1.000	1.000	0.000	0.00%	0.459	0.000	0.000
Secondary Alternative Provision Funding	2.875	2.875	0.000	0.00%	0.000	0.000	0.000
Non Wiltshire Pupils in Wiltshire Schools	0.000	0.000	0.000	0.00%	(0.029)	0.000	0.000
Devolved to Maintained & Top Up Total	23.711	23.711	0.000	0.00%	4.555	0.000	0.000
Wiltshire College Places	2.118	2.118	0.000	0.00%	0.000	0.000	0.000
Wiltshire Pupils in Non Wiltshire Schools	2.393	2.393	0.000	0.00%	0.775	0.000	0.000
Post-16 Top-Up	6.162	6.162	0.000	0.00%	3.050	0.000	0.000
Independent & Non-Maintained Special Schools	11.674	11.674	0.000	0.00%	1.627	0.000	0.000
SEN Alternative Provision, Direct Payments & Elective Home Education	2.370	2.370	0.000	0.00%	0.308	0.000	0.000
Education Other than at School (EOTAS)	0.491	0.491	0.000	0.00%	(0.066)	0.000	0.000
Funding for Places outside Schools	25.209	25.209	0.000	0.00%	5.695	0.000	0.000
High Needs in Early Years Provision	0.634	0.634	0.000	0.00%	(0.032)	0.000	0.000
Speech & Language	0.564	0.564	0.000	0.00%	(0.015)	0.000	0.000
SEND Business Support	0.115	0.115	0.000	0.00%	0.000	0.000	0.000
0-25 Inclusion & SEND Teams	2.527	2.527	(0.000)	-0.02%	(0.206)	0.000	-0.000
Specialist Teacher Advisory Service	1.390	1.390	0.000	0.00%	(0.132)	0.000	0.000
Other Special Education	0.409	0.409	0.000	0.00%	(0.149)	0.000	0.000
Commissioned & SEN Support Services	5.640	5.640	-0.000	-0.01%	-0.533	0.000	-0.000
High Needs Block	66.993	66.993	-0.000	0.00%	9.717	0.000	-0.000
Central Licences	0.409	0.409	0.000	0.00%	0.000	0.000	0.000
Central Provision (Former ESG)	1.191	1.191	0.000	0.00%	0.266	0.000	0.000
Admissions	0.447	0.447	0.000	0.00%	(0.015)	0.000	0.000
Servicing of Schools Forums	0.003	0.003	0.000	0.00%	0.000	0.000	0.000
Central Provision within Schools Budget	2.050	2.050	0.000	0.00%	0.251	0.000	0.000
Education Services to CLA	0.103	0.103	0.000	0.00%	(0.081)	0.000	0.000
Child Protection in Schools & Early Years	0.058	0.058	0.000	0.00%	0.000	0.000	0.000
Prudential Borrowing	0.133	0.133	0.000	0.00%	0.000	0.000	0.000
Historic Commitments	0.294	0.294	0.000	0.00%	-0.081	0.000	0.000
Central School Services	2.344	2.344	0.000	0.00%	0.170	0.000	0.000
Total Schools Budget	424.824	424.824	-0.000	0.00%	7.056	0.000	-0.000
Pupil Premium (academy & maintained)	15.540	15.540	0.000	0	Academy & Maintained school (excl CiC)		
6th Form Funding Maintained Schools (LSC Grant)	1.121	1.121	0.000	0	Maintained schools only		
UI Free School Meal Grant Provisional (academy & maintained)	5.462	5.462	0.000	0	Provisional allocations		
PE & Sports Revenue Grant (academy & maintained)	3.619	3.619	0.000	0	Allocation published 28/10/21		
DfE Revenue Grants for all Wiltshire Schools	25.741	25.741	0.000	0			
TOTAL DfE SCHOOLS FUNDING	450.565	450.565	0.000	0.00%			

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

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High Needs Block Group Meeting

Thursday 5th May 2022

Agenda

Apologies: Helean Hughes, Grant Davies

Attending: Cate Mullen; Marie Taylor; Lisa Percy; Lisa Fryer (for part of meeting); Lesley Lowe (for part of meeting); Lyssy Bolton; Sarah Garbett

Item	Brought by	Action Notes
Welcome and Introductions		
Costed provision map update	CM	<p>Costed provision map shared with the group – this will be shared with schools this week/beginning of next week</p> <p>Cate: Need to consider how returns can/should be dip sampled/reported on to guide the LA and stakeholders and ensure parity and understanding as well as the ability to learn and improve over time.</p>
HNB recovery plan – internal progress and external oversight and provisional outturn	MT	<p>Marie shared detail of the HNB overspend – lower than predicted due to the timeliness of assessments however, pressure will be felt in future financial years</p> <p>DSG management plan executive summary shared key pressures and mitigations discussed – high proportion of learners with SEMH needs reflects experience of school leaders</p>
Green Paper	CM	<p>Discussed the WC approach to pulling together a response via SEND board.</p> <p>Agreed that draft response to be shared with schools and partners to assist with further commentary and response.</p>

		<p>Cate: to ensure that the draft response following extraordinary SEND Board is disseminated</p>
<p>AOB- updates on placing/SEMH and high cost of out county placements</p>		<p>Melissa to provide some information as to the direction of travel with place planning projects and developments following the meeting</p> <p>Discussion relating to SEMH and AP</p> <p>Relation to EH within Wiltshire – need to ensure that families and communities are supported through this model</p>

Executive Summary

Summary of end of year positions

	2018-19 £,000s	2019-20 £,000s	2020-21 £,000s	2021-22 £,000s	2022-23 £,000s	2023-24 £,000s	2024-25 £,000s	2025-26 £,000s
Planned DSG position (surplus)/deficit	£2,072	£11,143	£19,050	£27,417	£39,333	£53,608	£73,319	£96,077

	2018-19 £,000s	2019-20 £,000s	2020-21 £,000s	2021-22 £,000s	2022-23 £,000s	2023-24 £,000s	2024-25 £,000s	2025-26 £,000s
In year net position deficit / (surplus)								
Schools block	£1,296,608	-£218,085	-£2,837,284	-£676,620	£0	£0	£0	£0
Central schools services block	-£384,196	-£262,973	-£67,651	£170,040	£8,000	-£63,000	-£219,000	-£219,000
Early years block	-£222,880	£1,082,196	-£695,188	-£1,881,172	£33,912	£0	£0	£0
High needs block	£3,528,468	£8,470,071	£11,507,394	£10,753,850	£11,874,449	£14,338,073	£19,930,007	£22,976,674
Total net	£4,218,000	£9,071,209	£7,907,271	£8,366,098	£11,916,361	£14,275,073	£19,711,007	£22,757,674

	2018-19 £,000s	2019-20 £,000s	2020-21 £,000s	2021-22 £,000s	2022-23 £,000s	2023-24 £,000s	2024-25 £,000s	2025-26 £,000s
Other								
Council contribution (negative)	-£1,300,000	£0	£0	£0	£0	£0	£0	£0
Add brought forward deficit / (surplus) (net)	-£846,000	£2,072,000	£11,143,209	£19,050,480	£27,416,578	£39,332,939	£53,608,012	£73,319,019
Planned year end position	£2,072,000	£11,143,209	£19,050,480	£27,416,578	£39,332,939	£53,608,012	£73,319,019	£96,076,693

Headline Mitigation/Savings

	Mitigations/ Savings 2018-19	Mitigations/ Savings 2019-20	Mitigations/ Savings 2020-21	Mitigations/ Savings forecast 2021-22	Mitigations/ Savings forecast 2022-23	Mitigations/ Savings forecast 2023-24	Mitigations/ Savings forecast 2024-25	Mitigations/ Savings forecast 2025-26
Key Mitigations/Savings								
1 Cease residential SLA at Special School					-£220,500	-£157,500	£0	£0
2 New special school places created at Silverwood					-£435,000	-£2,199,167	-£2,755,000	-£845,833
3 New special school places created at SAIL (150 place Free School) from September 2023 (TBC)						-£1,268,750	-£1,582,917	-£1,075,417
4 New secondary plus resource bases to stop movement into MSS and ISS at year 7 age phase transfer - using HNB capital					-£110,500	-£291,333	-£264,667	-£198,000
5 Increase in resource bases using HNB capital including specialist RB at Special School						-£258,750	-£207,000	-£277,500
6 New Free School Bid for 22-23 to 24-25 DfE Capital Grant - timeable not published								
7 ISS Placements - growth limited to 4.22% taking into account the working group plans to reduce demand on ISS & price work					-£905,400	-£1,950,412	-£3,152,163	-£4,529,741
8 Assumes a transfer of 0.5% from SB to HNB wherever possible to do so					-£1,581,047	-£1,644,369	£0	£0
9 Assumes a 5% a d subsequent 3% increases in HNB DSG						-£3,255,000	-£2,051,000	-£2,112,330
10 Revision of EHC needs assessment decision making process- increased engagement with schools and families & OAP and costed provision map development					-£135,870	-£135,870	-£135,870	-£135,870
Balancing item to help reconcile - misc								
Total savings	£0	£0	£0	£0	-£3,388,317	-£11,161,151	-£10,148,617	-£9,174,691

	Number of EHCP 2018-19	Number of EHCP 2019-20	Number of EHCP 2020-21	Number of EHCP Forecast 2021-22	Number of EHCP Forecast 2022-23	Number of EHCP Forecast 2023-24	Number of EHCP Forecast 2024-25	Number of EHCP Forecast 2025-26
1					-8	-6		
2					21	15	76	95
3						44	55	37
4						6	6	6
5							49	69
7						18	38	62
8								
9								
10								
Total	0	0	0	21	75	217	269	206

Appendix 1 – Schools Budget Forecast Position as at 31st March 2022

64.889 5.19110245 19.481 0.7792352

a

b

c

d = (c-b)

e = (d/b)

f

d = (c-b)

Service Area	Current Annual Budget £m	Period 12 Outturn £m	Period 12 Outturn Variance		20/21 Outturn Variance	February forecast variance £m
			£m	%		
Early Years Block	29.206	27.325	-1.881	-6.44%	-0.695	-1.186
Schools Block	316.207	315.530	-0.676	-0.21%	-2.819	2.143
Special School Place Funding	8.062	8.062	0.000	0.00%	0.000	0.000
Resource Base (RB) Funding	1.972	1.972	0.000	0.00%	0.000	0.000
Enhanced Learning Provision (ELP) Funding	1.887	1.887	0.000	0.00%	0.000	0.000
High Needs Block (all schools)	11.921	11.921	0.000	0.00%	0.000	0.000
Named Pupil Allowances (NPA)	6.416	7.509	1.093	17.03%	2.684	(1.591)
Special School Top-Up	8.251	9.915	1.664	20.17%	2.540	(0.876)
Resourced Base (RB) Top-Up	2.013	2.219	0.206	10.23%	0.621	(0.415)
Enhanced Learning Provision (ELP) Top-Up	1.667	2.829	1.163	69.76%	0.896	0.266
Estimate of Transitional Support (TSP) payments	0.000	0.459	0.459	#DIV/0!	0.000	0.459
Secondary Alternative Provision Funding	2.791	2.791	0.000	0.00%	0.025	(0.025)
Non Wiltshire Pupils in Wiltshire Schools	0.000	-0.029	(0.029)	0.00%	0.000	(0.029)
Devolved to Maintained & Top Up Total	21.137	25.693	4.555	21.55%	6.766	-2.211
Wiltshire College Places	2.100	2.100	0.000	0.00%	0.000	0.000
Wiltshire Pupils in Non Wiltshire Schools	2.074	2.849	0.775	37.36%	0.520	0.255
Post-16 Top-Up	2.735	5.785	3.050	111.54%	1.484	1.566
Independent & Non-Maintained Special Schools	11.846	13.473	1.627	13.73%	2.160	(0.533)
SEN Alternative Provision, Direct Payments & Elective Home Education	2.290	2.598	0.308	13.46%	0.699	(0.390)
Education Other than at School (EOTAS)	0.536	0.470	(0.066)	-12.28%	0.002	(0.068)
Funding for Places outside Schools	21.581	27.276	5.695	26.39%	4.865	0.830
High Needs in Early Years Provision	0.454	0.422	(0.032)	-7.05%	(0.032)	0.000
Speech & Language	0.566	0.551	(0.015)	-2.63%	(0.023)	0.008
SEND Business Support	0.088	0.088	0.000	0.00%	0.000	0.000
0-25 Inclusion & SEND Teams	2.539	2.339	(0.200)	-7.87%	0.000	(0.200)
Specialist Teacher Advisory Service	1.138	1.007	(0.132)	-11.56%	(0.181)	0.050
Other Special Education	0.271	0.122	(0.149)	-54.84%	(0.148)	(0.001)
Commissioned & SEN Support Services	5.056	4.529	-0.527	-10.42%	-0.384	-0.143
High Needs Block	59.695	69.418	9.723	16.29%	11.247	-1.524
Central School Services	2.181	2.351	0.170	7.78%	-0.068	0.237
Total Schools Budget	407.289	414.624	7.335	1.80%	7.664	-0.330

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Wiltshire Council

Schools Forum Finance & SEN Working Group 23rd May 2022

Schools Forum 9th June 2022

DfE Consultation – ‘Completing the reforms to the National Funding Formula’

Purpose of report

1. To provide an update following the Department for Education (DfE) consultation with stakeholders regarding their reforms to the National Funding Formula (NFF), which took place between July and September 2021. Given the timing of the consultation, a report was presented to an extraordinary meeting of the School Funding and SEN Working Group in September 2021
2. The DfE have published their response following the consultation and this report sets out the outcome from the responses and the proposed next steps.
3. The report is for information only and it should be noted that a second stage consultation is proposed, with more detailed proposals in 2022.

Background

4. A link to the DfE’s consultation response can be accessed using the link [here](#).
5. The DfE held the consultation on proposed changes to complete their reforms to school funding and move to a “direct” schools NFF.
6. The consultation sought views on the approach to reforming the NFF and how the DfE could most effectively transition away from the use of local formulae to all schools’ funding allocations being determined directly by the NFF in the years ahead.
7. The consultation reflected the continued DfE journey towards a ‘**hard**’ formula with no or little local flexibility. In Wiltshire, our formula has been aligned with the NFF and therefore there would be no, or very little impact, on budgets for Wiltshire schools.
8. A School Funding and SEN Working Group (Schools Forum) response was compiled and shared with Headteachers, Governors and School Business Managers via Right Choice, Helean’s Weekly Newsletter and the respective ‘Briefings’. Wiltshire was well represented with responses from schools, the local authority and the Wiltshire Governors Association.

Outcomes from the Consultation

9. The key outcomes from the consultation include:
 - The DfE will move to allocate funding for all mainstream schools according to a single, national formula (removing local flexibility)
 - The Government will bring forward the relevant legislation to achieve this change when parliamentary time allows

10. The DfE have not committed to a fixed date by which the NFF will be in place but instead have confirmed that they will transition across to the NFF. From the 2023-24 year, the DfE will require:
 - LAs to use all, and only, NFF factors in their local formulae
 - All local formulae factors to move at least 10% closer to the NFF, except where local formulae are already “mirroring” the NFF
 - LAs to use the NFF definition for the English as an Additional Language (EAL) factor
 - The approach to transition in subsequent years will depend on the impact in the first year

11. As part of a second-stage consultation for improving the NFF, in the 2022 year, the DfE will
 - Consult on an approach to the split sites factor and to the PFI factor in the NFF
 - In the second stage consultation, include proposals for the revised growth and falling rolls factor – and some options which would allow a degree of local flexibility
 - In the second stage consultation, include proposals for an exceptional circumstances factor

Impact in Wiltshire

12. Having moved the Wiltshire funding formula to align with the NFF, there will be a minimal impact for schools in Wiltshire. The areas which could impact upon our schools are still subject to further consultation and include the following factors:
 - Split site funding and a move to a national approach
 - PFI funding – to be consulted on later
 - Exceptional Premises factors which have always been funded on a historical basis, will be included in the second stage of consultation.
 - A national approach to funding growth and falling rolls will form part of the second stage of consultation

Moving maintained schools to be funded on an academic year basis

13. As part of the consultation, stakeholders were asked about their views for moving maintained schools to being funded on an academic year basis.
14. The results were inconclusive without a clear majority in favour of a move. Given the additional workload to transition to a new funding year, particularly for small primary schools, this area will not be prioritised as a move towards the direct NFF.

Role of Schools Forum

15. The move to a direct NFF would mean that the role of schools' forums will change. The DfE expect that schools' forums will continue to play an important part in local decision making and stakeholder engagement.
16. The proposed reforms do not, for example, have an impact on schools' forums' existing roles in relation to early years funding or de-delegation. The DfE also plan to review how schools' forums engage with high needs funding issues, following the SEND Review.

Proposals

17. Schools' Forum notes the DfE's response to their consultation on reforms to the NFF.

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Wiltshire Council

Schools Forum Finance & SEN Working Group 23rd May 2022

Schools Forum 9th June 2022

Annual Schools Consultation

- *Delegation of Central Expenditure 2023-24*
- *Funding for Education Functions 2023-24*
- *Transfer of funding from Schools Block to High Needs Block 2023-24*

Purpose of report

1. To brief Schools Forum and agree a set of questions to be sent out to all schools in the Autumn of 2022.

Background - De-Delegation of Central Expenditure

2. In order to give schools greater choice over how to spend their budgets, Local Authorities are required to work on the basis that services within the notional Dedicated Schools Grant (DSG) Schools Block, and the funding for them, should be delegated to schools in the first instance.
3. This means that a number of DSG funded budgets that have previously been retained centrally must now be delegated to schools. There are a number of exceptions to this and there are also a number of budgets that maintained primary and/or secondary schools can agree to *de-delegate* so that they continue to be provided centrally.
4. De-delegation cannot be applied to amounts delegated to academies or to special schools. Delegation or de-delegation cannot be agreed on an individual school basis for maintained schools but can be agreed by phase so a different outcome can be agreed for primary and secondary schools. Approval for de-delegation is by the relevant phase members of Schools Forum following responses to this consultation.
5. A consultation document will be sent out to all maintained schools in the autumn to seek views on the delegation of central budgets. The budgets/services being consulted on are as follows:
 - Free School Meal Eligibility Service
 - Licences (Access Budget Planning)
 - Trade Union Facilities costs
 - Maternity costs
 - Ethnic Minority Achievement Service
 - Travellers Education Service
 - Behaviour Support Service

6. There are a number of outcomes that could flow from the proposals to delegate the budgets. These include:
 - a. Following consultation, maintained schools agree that budgets should be de-delegated and retained centrally by the LA with services provided to all maintained schools;
 - b. Schools agree that budgets should be delegated, and schools make/purchase their own provision as appropriate;
 - c. Schools agree that budgets should be delegated, and they then cluster together to purchase or deliver services.
7. Under scenario (a) the LA would be able to retain a level of service to provide to maintained schools, gaining from the economies of scale through this arrangement. The size of the service may need to be scaled back over time as the number of academies increases.
8. Under scenarios b and c the LA would not be able to continue to deliver a service unless there is sufficient buy back on a traded basis from schools (maintained or academy) to enable retention of sufficient staff. This will be difficult to predict, and the LA will need to decide whether it can afford to continue to deliver services centrally on a fully traded basis with full cost recovery. This would require a risk assessment.
9. **Appendix 1** to this report lists the consultation questions.

Education Functions

10. Following consultation last year, the DfE have reduced the Local Authority Monitoring and Brokering Grant (LAMB) by 50% in 2022-23, with full removal to take place in the 2023-24 year. Local authorities have the opportunity to fund improvement services through either de-delegation or on a traded basis.
11. A local consultation exercise was undertaken in advance of the 2022-23 year to determine whether maintained schools would elect to de-delegate funding from their budgets to support the loss in the LAMB grant.
12. The annual grant had stood at £459,000 in the 2021-22 year and has been reduced by 50% in 2022-23. The DfE proposals removal of the grant in 2023-24. In 2022-23, maintained schools de-delegated funding of £9.39 per pupil.
13. The School Effectiveness team are working to set out proposals regarding options for the delivery of the service from 2023-24, in order to consult with maintained schools and understand the most appropriate route to fulfil their needs.

Background – Transfer of Schools Block to High Needs Block 2023-24

14. Schools Forum will recall a transfer of 0.5% of School Funding was agreed to contribute to the High Needs Block recovery plan in the 2022-23 financial year.
15. There is a commitment to increase schools revenue funding again for 2023-24 which includes national increases in both Schools Funding and funding for High Needs.
16. The HNB overspend for 2018/19 was £4.8m, 2019-20 was £9.1m, 2020-21 was £11.507m and for 2021-22 was £8.948m which correlates to the continuing rise in request for new Education and Health Care Plans (EHCPs) and banding / funding increases. At the end of the last financial year the DSG reserve held a cumulative £25.973m deficit (includes EY adjustment).
17. Although the deficit is supported by a recovery plan, this is a long-term programme of change. The requirement for significant additional funding at national level is clear and acknowledged by the DfE.
18. The forecast position for 2022-23 is subject to another report but shows an overspend once again and should this come to fruition the DSG deficit reserve will be even greater which is becoming unsustainable for the local authority to cashflow.
19. For this reason, it is recommended that we seek views of all schools on the questions in **Appendix 3** which covers a range of options ranging from transferring funding from Schools Block.

Proposals

20. That Schools Forum decide on the consultation questions for maintained schools around delegation/de-delegation of budgets for central services within the schools' block. Appendix 1 & 2.
21. That Schools Forum decide on the consultation questions for all schools around setting the 2023/24 Schools Budget. Appendix 3.

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Appendix 1 – De-Delegation 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)		
	Traveller Education Service		
Behaviour support services	Primary Behaviour Support Service		

Appendix 2 – Education Functions Questions

DfE Heading	Wiltshire Budget	Delegate?	Retain Centrally?
Education Functions	Removal of LA Monitoring & Brokering Grant		

Appendix 3 –2023-24 Schools Consultation:

Background

- *The High Needs block overspent by £4.8m in 2018/19, by a further £9.1m in 2019/20, by £11.5m in 2020/21 and £8.948m in 2021-22 with a further forecast to overspend in 2022/23.*
- *There is an £25.973m deficit DSG reserve on the Council's balance sheet – the forecast 22/23 overspend will increase this deficit further.*
- *EHCPs have been increasing by an average of over 11% annually mirroring the national level, before taking into account any impact from Covid.*
- *The LA is working with schools and settings and is taking actions to address the level of overspend. Many of these actions require a partnership approach and require planning and change management in order to achieve long term success.*

The DSG is ringfenced and therefore to manage this overspend, it is suggested an amount is transferred from the Schools Block to the High Needs Block as in the previous three years.

Q1 a) Taking the factors above into account, do you support a transfer of funding from the School Block to the High Needs Block?

Yes	
No	

b) If you support a transfer, please indicate the amount: *(amounts to be updated for latest pupil numbers)*

Value to Transfer	£/Pupil	Please select
£0.0m (0.0%)	£0.00 / pupil	
£0.5m (0.15.8%)	£7.79 / pupil	
£1.0m (0.31.6%)	£15.58 / pupil	
£1.58m (0.5%)	£24.63 / pupil	

c) No transfer of funding from the Schools Block to the High Needs Block for 2023-24.

This decision is on the understanding that High Needs funding and support, currently provided to schools, may have to be reduced to help towards balancing the High Needs Block budget?

Agree to transfer funds	
Agree NOT to transfer funds	

d) Would you prefer to see a hybrid of the options above. This would involve a partial transfer from Schools Block to top up the High Needs Block along with a partial reduction in High Needs funding and support provided to schools.

Yes	
No	

2) 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?

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**Schools Forum Funding & SEN Working Group
23rd May 2022**

**Schools Forum
9th June 2022**

HOUSEHOLD SUPPORT FUND (HSF) - 2022-23

Purpose of the Report

1. To present the councils expenditure plan for the Household Support Fund grant received from the Department of Work and Pensions (DWP.)

Main Considerations

2. Central government introduced a “Winter Grant” during the pandemic to assist which later transformed into the “Local Grant.” Local authorities operated schemes within terms and conditions of the grant but with local flexibility to ensure local needs were prioritised. The grant is now renamed the Household Support Fund.
3. The allocations of support provided in Wiltshire to date have been:

Grant Name	Timeframe	Families with Children	Individuals and Families without Children	TOTAL Grant Allocation
Winter Grant	1/12/20-16/04/21	£1.280m	£0.131m	£1.412m + <i>admin £0.084m</i>
Local Grant & extension	17/4/21-30/09/21	£1.252 + <i>cfwd admin</i> £0.084m	£0.024m	£1.301m + <i>admin £0.003m</i>
Household Support Fund Surviving Winter	06/10/21-31/03/22	£1.868m	£0.733m	£2.601m + £0.128m <i>admin</i> (LWP reserve)

4. Some schemes were not fully taken up and in order to maximise the grant, allowable administration costs were claimed, the winter grant administration was added to the local grant funding and allocated to schemes for families with children. The surviving winter administration costs were transferred into a specific reserve in the balance sheet for local welfare provision (crisis support) to be used in 22-23.
5. Local partners including school and community groups have worked well together to ensure disadvantaged families and individuals have benefitted from this support.
6. The terms and conditions of the grant have changed over time with the focus moving from “at least 75%” to be used to support families with children to an equal split for 2022-23 HSF funding:
7. The Authority must ensure that:
 - i) at least 50% of the grant is allocated to support households that include:
 - a person who will be under the age of 19 as at 31st March 2022, or

- a person aged 19 or over in respect of whom a child-related benefit is paid or free school meals are provided during the Grant Period, and

ii) up to 50% of the grant is used to assist other households, and

b) the Authority is to ensure that the grant is primarily allocated to support with the costs of food, energy (for heating, lighting and cooking), water (for household purposes, including sewerage) and other essential living needs in accordance with the Scheme guidance.

c) in exceptional circumstances of genuine emergency, the Authority may allocate grant funds to support with housing costs as set out in the Scheme guidance.

8. The planned use of the current year's allocation of £2,728,656.41 is as follows.

<p>Allocation to families with children £1,237,845 (45% of total grant)</p>	<p>FSM weekly payment of £12.14 per week (£15 for May half term & £10 per week of summer holidays).</p> <p>FSM allocation = £884,175 (£75 per child for the period) Low-income non-FSM allocation = £353,670 (£52 per child for the period)</p> <p>It is recommended that sums based on the number of children in this wider cohort at each school are transferred directly to individual schools for them to distribute at their discretion to meet need within the cohort during the grant period.</p>
<p>Allocation to pensioners £909,552 (33% of total grant)</p>	<p>Wiltshire Community Foundation 'Poverty Hurts' allocation: £101,111) this allocation has been doubled from the previous grant allocation which was fully spent.</p> <p>Pension Credit Households with no other income (6029) payment of £134 each = £808,441</p>
<p>Allocation of remaining funds for other vulnerable residents £538,632 (20% of total grant)</p>	<p>Food Banks £30,000 This allocation has been based on previous take up from the foodbanks.</p> <p>Housing Services £30,000 To focus on clients in temporary accommodation, supported accommodation or those recently moved into permanent accommodation who require additional support. This will mainly be for single clients but also for those families who are struggling. Planned assistance 500 – 600 clients mainly food vouchers or vouchers to assist with utility bills on average £50 per client.</p> <p>LWP £0 The service has confirmed no additional funding is required for this grant period due to the funding below</p> <p>Working Age Households £478,632 To be allocated to 7252 working age households affected by poverty & in a protected group with payment of £66 to be made directly to identified households via Payment Card. This group includes the long-term sick, receive PIP, DLA etc and those with a disability that would mean going to work is unlikely; they are the most vulnerable within the wider cohort of low-income working age households. It is known that 1600 of these households have children that</p>

	are eligible for FSM & will therefore also receive payment through that strand of HSF.
Admin costs £22,034	No Council admin costs have been factored in this is being absorbed. Payment card cost £22,034.56 7,252 payments would incur additional costs of £22,034.56 for training, set-up & card issue fees.
Contingency	£20,593.41 – to fund increased demand e.g., food banks
TOTAL	£2,728,656.41

Proposals

9. Schools Forum is asked to note the expenditure plan for the Household Support Fund and the change of focus from support for families to support both families and other households.

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