

## Schools Forum

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### **MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 19 JANUARY 2023 AT COUNCIL CHAMBER - COUNTY HALL, BYTHESEA ROAD, TROWBRIDGE, BA14 8JN.**

#### **Present:**

Rod Bell, Lyssy Bolton, Andy Bridewell, Rebecca Carson, Michelle Chilcott, Stella Fowler, John Hawkins, Georgina Keily-Theobald, Graham Nagel-Smith, Lisa Percy (Chair), Giles Pugh, Graham Shore (Vice Chair), Trudy Srawley, Catriona Williamson

#### **Also Present:**

Grant Davis (Schools Strategic Financial Support Manager), Cate Mullen (Head of SEND and Inclusion), Lisa Pullin (Democratic Services Officer), Marie Taylor (Head of Finance – Children and Education) and Lucy Townsend (part of meeting) – (Director of Children’s Services)

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

Apologies were received from Aileen Bates, Angela Brennan, Cllr Ross Henning, Nick Norgrove, Emma Osmund, John Read, Ros Sutton, Ian Tucker, David Whewell and from Helean Hughes (Director – Education & Skills), Cllrs Laura Mayes (Cabinet Member – Children Education and Skills), Dominic Muns (Portfolio Holder for Education), Suzanne Wickham (Portfolio Holder for SEND).

#### **Substitutions**

Rod Bell was substituting for Ian Tucker.

### **2 Minutes of the Previous Meeting**

The minutes of the meeting held on 8 December 2022 were presented.

#### **Resolved:**

**That the Chair approve and sign the minutes of the meeting of Schools Forum held on 8 December 2022.**

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

The Chair made the following announcements:

#### **Sad news – Emma Russell**

It was with great sadness and shock that we lost our friend and colleague Emma Russell shortly before Christmas.

Headteacher of Kennet Valley Primary School, Emma was a passionate, fun and inspiring individual. Emma worked tirelessly for the hundreds of children and families that passed through Kennet Valley during her time there. Emma was incredibly proud of her school and the achievements of her staff and children. She was a true community champion and brought much happiness to many people, not just within the school, but those in the community who were always warmly welcomed at school events and community activities.

Emma had only just received a long service award after 20 years of service and an unwavering commitment to making a difference to her pupils. Emma held ambitions not only for her pupils and staff but for education in Wiltshire as a whole. Never afraid to challenge, always willing to assist, for me Emma personified what it is to be a teacher and leader.

Today we officially lay her to rest and celebrate her life. She was a wonderful friend to many of us and having spoken to many children and parents who knew Emma through Kennet Valley I am certain that she will never be forgotten and her legacy remains for the children of Lockeridge and beyond.

#### 4 **Declaration of Interests**

There were no interests declared.

#### 5 **Public Participation**

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

#### 6 **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 6 January 2023 (which were contained in Agenda Supplement 1). There were no questions arising.

The Forum noted the update received by way of the minutes of the joint meeting of the School Funding and SEN Working Group held on 9 January 2023. There were no questions arising.

#### **Resolved:**

**That Schools Forum note the minutes of the meeting of the Early Years Reference Group held on 6 January 2023 and the joint meeting of the School Funding and SEN working group held on 9 January 2023.**

#### 7 **Dedicated Schools Budget - Budget Monitoring 2022-23**

Marie Taylor (Head of Finance – Children and Education) referred to the report which presented the year end budget monitoring information against the DSG for the financial year 2022-23 as at 30 November 2022 and highlighted the following:

- An overspend £9.325 million was currently projected across the overall DSG schools budget which was a small increase from the meeting in December 2022;
- Although an underspend of £2.257 million was forecast for the Early Years budget it was anticipated that the DfE's post financial year adjustment would claw this back in the summer in whole or part if the January 2023 census numbers fall;
- The main reason for the underspend was the take up for 3 and 4 year olds and there was a slight underspend on take up for 2 year olds although there was an overspend in the Inclusion Support Fund as the 30 hours take up was higher than anticipated, largely due to the expansion of the scheme to support working parents for up to 30 hours;
- Officers had been successful with a 2022-23 bid for COMF grant funding to use in early years settings to support flexible pastoral support. There had been no claims for hardship this year and it was suggested that settings could be approached again to see if they wished to make any bids;
- There was a forecast underspend on the School budgets of £179k – this was because of alternative grants being used including some Ukrainian funding;
- The High Needs budget was due to overspend by £12.182 million – when the level of funding doesn't match the local needs the budget cannot be set at an achievable level and is clear that the whole budget is under significant pressure;
- There had been an increase in EHC assessments which had been delayed due to the Covid backlog. The forecast increase in EHCP's was 574 which was a 13.1% increase compared to a 6.1% in 2021-22;
- There was a small forecast underspend for the Central Schools Services block of £421k which was driven by careful management of the specialist education packages for children in care as well as use of alternative external grant funding where possible to do so;
- The reserve brought forward of £25.973 million was increased by the positive early years block adjustment of £564k. The forecast overspend would take the reserve into a deficit position of £34.734 million. Officers were working closely with the DfE's Delivering Better Value (DVB) partners (CIPFA and Newton) to enhance current plans, adding insight from other local authority action plans and offering the opportunity to bid for transformational funding; and

- The Early Years Reference Group had considered the limited one off usage of the early years contingency to support children for school readiness and support for vulnerable early years pupils with additional needs. This would be by way of four FTE temporary Early Years Intervention Advisors, Inclusion Support for settings and an Early Years Conference in the summer or autumn term 2023. These proposals were anticipated to assist with Covid recovery for children and also contribute to the early help and prevention agenda.

**Resolved:**

**That Schools Forum note the year end budget monitoring position as at 30 November 2022 in conjunction with the high needs recovery plan and the Delivering Better Value update.**

**8 High Needs Block Update**

Cate Mullen (Head of SEND and Inclusion) presented a verbal update on behalf of the High Needs block working group and highlighted the following;

- There was currently a £34 million High Needs block deficit in Wiltshire and the aspirational challenge was to bring back the spending to a balanced budget;
- There was good news that £1.7 million of transformation funding had been made available to carry out deep dive work. This funding would support the development of roles and capacity to undertake the work associated with the DBV programme. It had been agreed to delay this start of this work until summer 2023 as this would enable key positions and capacity to be in place to align to the timetable for the DBV work. Schools Forum would be kept updated on this work;
- There was to be an additional £2.9 million of funding of the High Needs block to support an uplift in funding to Special Schools of 3.4%. A further protection through a positive minimum funding guarantee (MFG) for special schools of 3% has been applied to funding rates from 2021-22. These are to reflect HNB operational guidance and are new for 2023-24. It was planned to support early intervention support work in Wiltshire with the balance. Whilst there were two options available – namely to offset the deficit or to support activity linked to High Needs budget work it was felt more appropriate to utilise the balance to support work and early intervention to our children and families, supporting them at an earlier stage to hopefully reduce future demand;
- An extension to accounting override on the High Needs block deficit for a further 3 years had been granted by central Government to 31 March 2026, however, the override past this point was unclear. For now this gave short term certainty and would allow time for them to understand the Wiltshire and other LA's position; and

- An investment request/growth bid was due to be submitted to Cabinet soon to reflect the significant and ongoing growth within SEND.

The slides are attached to the minutes as **Appendix 1**.

**Resolved:**

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

### **Appendix 1 to Minutes - High Needs Block update presentation**

#### **9 Additional School Capital Funding for 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 capital funding and how it will be allocated to schools in the 2022-23 year and highlighted the following:

- In December 2022 the DfE announced an additional £500 million capital funding for the 2022-23 year to be prioritised on projects that improve a school estate's energy efficiency. Where individual schools judge that this is not appropriate based on local circumstances, schools have discretion to spend this on other capital projects. The DfE had issued guidance on how schools could improve their energy efficiency and reduce their energy costs and the funding could be rolled forward into 2023-24;
- Schools should have already received this funding which was allocated as a £10,000 lump sum and then a weighted pupil rate of £20.06 depending on the pupils at the school; and
- The DfE are only able to fund 90% of costs for VA schools as VA Governing Bodies are responsible for their own capital works and are also unable to recover VAT. The net impact of the VA factor is a multiplier of x 1.08 which in effect increases their DFC allocation by 8%, to take account of the unrecoverable VAT.

A maintained schools representative asked if schools could decide to use the funding for example for staffing costs and if there would be any recourse if this was chosen? Grant Davis responded that the funding must be spent on capital expenditure and could not be used for staffing or any other revenue costs.

An early years representative asked if a weighting would be applied for children in mainstream schools but with higher needs attending resource bases for example. Grant Davis said that he would need to check and clarify that position, but the weighting is based upon the type of school rather than pupil characteristics.

The Salisbury Diocesan representative reported that their schools in Dorset and Wiltshire were carrying out decarbonisation surveys.

**Resolved:**

**That Schools Forum note the report on additional school capital funding for 2022-23.**

10

**School Budget Setting 2023-24**

**10a School Revenue Funding 2023-24 - 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 2023-24 and highlighted the following:

- The DfE had issued the revenue funding settlement for schools on 16 December 2022. 2022-23 was the final year of the 'Boris Billions' which had pledged a cash increase of £14.5 billion over 3 years from 2020-21. There had also been a further pledge for high needs over the 3 years;
- For the 2023-24 year there had been an increase of £2.3 billion in to overall Schools Block and a further £400 million had been pledged for the High Needs for the year;
- The Schools Block of funding had now incorporated the 2022-23 Schools Supplementary Grant funding rates and these were now baselined into the NFF rates. It was another 'soft' year with local Schools Forum still retaining its role in determining the school funding allocation methodology. The DfE have indicated their intention to move to 'hard' NFF by 2027-28. In the meantime there would be a tightening towards the full NFF but this would not impact Wiltshire who were already following the NFF funding factors;
- The Minimum Funding Guarantee (MFG) had been adjusted to ensure all schools gain through the per pupil allocations and must be set between 0.0% and 0.5%. For the 2023-24 year the overall funding through the NFF had increased by 1.9%. Core pupil led factors and the lump sum increased by 2.4% and disadvantaged funding, FSM6 and IDACI factors increased by 4.3%. The minimum per pupil funding level increased by 3.3% and the FSM factor had increased by 2%;
- A transfer of up to 0.5% of Schools block funding to the High Needs block was permitted subject to Schools Forum approval;
- The Local Authority Monitoring and Brokering (LAMB) grant would be phased out completely and LA's were able to de-delegate funding from maintained schools to support school improvement;
- The DfE would continue to pay Business rates on behalf of all schools liaising with the LA directly around this;

- The Pupil Premium rates for 2023-24 were being uplifted by 5%;
- The provisional DSG allocation was £452.297 million which was increase of £29.887 million from 2022-23;
- Due to previous prudent decision making Wiltshire was able to fully fund their schools, but Officers were aware of colleagues in other LA's who were not able to fully fund their schools this financial year;
- There had been a drop in the numbers of primary school pupils but it was marginal at 1.5% bearing in mind the birth rate drops of 10%. There had been an increase in secondary school pupils and overall for the 2023-24 the increase was 109 pupils;
- Included within the Schools Block funding of £346.293 million is the amount of £1.964 allocated on the basis of pupil growth within Wiltshire;
- The uplifted funding for the High Needs block reflected and included Wiltshire's share of the £400 million additional funding announced for High Needs in 2023-24 and the additional High Needs allocation of £2.942 million;
- The indicative hourly rates for 2023-24 had been announced but it should be noted that the Early Years block would ordinarily be updated during the financial year to reflect the January 2023 and January 2024 early years census data;
- 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 (which has been previously agreed in principle);
- Local Authorities are required to submit their proposed delegated budget for schools in their areas by 20 January 2023 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 2023;
- At the December 2022 Schools Forum meeting, it was agreed by the maintained schools voting members that the de-delegation of services would continue in 2023-24, as in 2022-23. The amount of each de-delegated service budget is based upon the relevant formula factors for maintained schools and would be voted on later in the meeting; and
- It had also been previously agreed that maintained schools would de-delegate funding to support school improvement services, previously funded from the LAMB grant which would be phased out from April 2023.

The Chair commented that the early indicative allocations given and the provisional decisions made by Schools Forum had paid dividends to put us in a position to know where we are.

The Salisbury Diocesan representative reported that the Dorset Schools Forum had made the decision to reduce the funding available for Primary Schools. Grant Davis commented that Wiltshire were in a privileged position to be able to afford to fully fund their schools and but that down to good collaborative work and collective decisions of Wiltshire Schools Forum.

**Resolved:**

**That Schools Forum note the report.**

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

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 2023-24 and highlighted the following:

- The DfE had issued the revenue funding settlement for schools on 16 December 2022. 2022-23 was the final year of the 'Boris Billions' which had pledged a cash increase of £14.5 billion over 3 years from 2020-21. There had also been a further pledge for high needs over the 3 years;
- For the 2023-24 year there and been increase of £2.3 billion in to overall Schools Block and a further £400 million had been pledged for the High Needs for the year;
- The Schools Block of funding had now incorporated the 2022-23 Schools Supplementary Grant funding rates and these were now baselined into the NFF rates. It was another 'soft' year with local Schools Forum still retaining its role in determining the school funding allocation methodology. The DfE have indicated their intention to move to 'hard' NFF by 2027-28. In the meantime there would be a tightening towards the full NFF but this would not impact Wiltshire who were already following the NFF funding factors;
- The Minimum Funding Guarantee (MFG) had been adjusted to ensure all schools gain through the per pupil allocations and must be set between 0.0% and 0.5%. For the 2023-24 year the overall funding through the NFF had increased by 1.9%. Core pupil led factors and the lump sum increased by 2.4% and disadvantaged funding, FSM6 and IDACI factors increased by 4.3%. The minimum per pupil funding level increased by 3.3% and the FSM factor had increased by 2%;
- A transfer of up to 0.5% of Schools block funding to the High Needs block was permitted subject to Schools Forum approval;



- The Local Authority Monitoring and Brokering (LAMB) grant would be phased out completely and LA's were able to de-delegate funding from maintained schools to support school improvement;
- The DfE would continue to pay Business rates on behalf of all schools liaising with the LA directly around this;
- The Pupil Premium rates for 2023-24 were being uplifted by 5%;
- The provisional DSG allocation was £452.297 million which was increase of £29.887 million from 2022-23;
- Due to previous prudent decision making Wiltshire was able to fully fund their schools, but Officers were aware of colleagues in other LA's who were not able to fully fund their schools this financial year;
- There had been a drop in the numbers of primary school pupils but it was marginal at 1.5% bearing in mind the birth rate drops of 10%. There had been an increase in secondary school pupils and overall for the 2023-24 the increase was 109 pupils;
- Included within the Schools Block funding of £346.293 million is the amount of £1.964 allocated on the basis of pupil growth within Wiltshire;
- The uplifted funding for the High Needs block reflected and included Wiltshire's share of the £400 million additional funding announced for High Needs in 2023-24 and the additional High Needs allocation of £2.942 million;
- The indicative hourly rates for 2023-24 had been announced but it should be noted that the Early Years block would ordinarily be updated during the financial year to reflect the January 2023 and January 2024 early years census data;
- 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 (which has been previously agreed in principle);
- Local Authorities are required to submit their proposed delegated budget for schools in their areas by 20 January 2023 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 2023;
- At the December 2022 Schools Forum meeting, it was agreed by the maintained schools voting members that the de-delegation of services would continue in 2023-24, as in 2022-23. The amount of each de-

delegated service budget is based upon the relevant formula factors for maintained schools and would be voted on later in the meeting; and

- It had also been previously agreed that maintained schools would de-delegate funding to support school improvement services, previously funded from the LAMB grant which would be phased out from April 2023.

The Chair commented that the early indicative allocations given and the provisional decisions made by Schools Forum had paid dividends to put us in a position to know where we are.

The Salisbury Diocesan representative reported that the Dorset Schools Forum had made the decision to reduce the funding available for Primary Schools. Grant Davis commented that Wiltshire were in a privileged position to be able to afford to fully fund their schools and but that down to good collaborative work and collective decisions of Wiltshire Schools Forum.

**Resolved:**

**That Schools Forum note the report.**

#### **10c Dedicated Schools Budget - Central School Services Block Update 2023-24**

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 2023-24 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 £2.600m and this had been calculated using the NFF which applies a unit value of £36.75 to the pupil numbers from the October 2022 census. Funding for historic commitments for 2023-24 would then be added to the amount of funding generated by the formula to give the overall total CSSB;
- Schools Forum approval was required on a line by line basis for the group of services which are funded from the Central School Services block;
- Section A related to copyright licences being set at £457k although no decision was required by Schools Forum;
- Section C related to historical commitments with the overall total of £235k being allocated. This would reduce by 20% year on year; and
- This would leave a balance of £133k unallocated and available to transfer to the High Needs block and it was proposed to do this again this ear.

**Resolved:**

**That Schools Forum note the change to the copyright licence cost for 2023-24 and reduction in the contribution to the High Needs block in the report and the required decisions below to the Central School Services block budget for 2023-24.**

- i) Section A – central copyright licences -consult only**
- ii) Section B – central functions - approve on a line-by-line basis**
- iii) Section C – historic commitments -approve on a line-by-line basis**

**Including the transfer of surplus CSSB grant to support the high needs block.**

#### **10d Dedicated Schools Budget - Schools Block Update 2023-24 (Delegated Budget)**

Grant Davis (Schools Strategic Financial Support Manager referred to the report which sought to update on the revenue funding settlement and the budget setting process for 2023-24 and highlighted the following:

- The DfE had allocated a Schools block quantum to Wiltshire of £346.293 million - this included funding of £1.964 million for the growth fund, based on the growth formula;
- Modelling work had been prepared to calculate individual school budgets based on the DfE's NFF. The main funding formula for 2023-24 was broadly similar to the formula for 2022-23 but the following changes should be noted:
  - An increase in Pupil and School led funding values of 2.4% with Deprivation funding increased by 4.3%
  - Minimum Funding Guarantee set between 0.0% and 0.5% to ensure all schools see a gain in funding on their pupil led funding. It was proposed to set this for Wiltshire at 0.5%
  - Increases in the minimum per pupil funding levels (MPPFL) to £4,405 and £5,715 in primary and secondary schools
- Agreement was given by Schools Forum in December 2022 to transfer £1.716 million (0.5%) to the High Needs block which would then mean there was £341 million available for school funding and once the NFF requirements had been taken would leave £532,650 for the Growth Fund and Officers were confident that this was sufficient for the demands for the year;
- There had been growth of 198 primary and 725 secondary pupils during 2022-23, within the DfE's growth areas, and there were no plans to open any new schools in the 2023-24 year. The Basic Need Class Expansion for additional classes was still to be confirmed with colleagues for the 2023-24 year and no more than 4 schools were expected to be funded through the Infant Class Size increases;

- Setting a positive MFG of 0.5% was fully affordable and would ensure that all schools see an uplift in their 'per pupil' funding of at least 0.5%. The cost to the formula in 2023-24 is £165k, subject to decisions to be taken later by Schools Forum; and
- As part of the DfE's proposals to support small and rural schools, the maximum sparsity value for primary schools has now increased to £56,300, with Secondary schools increasing to £81,900. There were 66 eligible primary schools and 2 secondary schools.

**Resolved that Schools Forum:**

- 1. Note the Schools Block update report.**
- 2. Agree to apply all the funding factors at the 2023-24 NFF rates.**
- 3. Note the stability and impact of the Sparsity factor.**
- 4. Agree to set the Minimum Funding Guarantee at a level of 0.5%.**
- 5. Agree to transfer 0.5% of the Schools Block to the High Needs Block, £1.716m, as the funding formula is affordable.**
- 6. Agree that the Growth fund be set at £0.533m.**

*(The decisions numbered 2-6 above were made later in the meeting under Agenda item 11)*

*The Forum agreed to suspend the meeting at 3.05pm for a comfort break. The meeting reconvened at 3.10pm.*

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

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to outline on the level of additional funding and how it will be allocated in schools in the 2023-24 year and highlighted the following:

- At the December meeting it was announced that there would be an additional £2 billion of funding for mainstream schools and high needs during 2023-24 in support of the general costs of living expenses, pay awards and the wider cost pressures in schools. The remaining £400 million was allocated to High Needs of which Wiltshire's share is £2.94 million;
- To differentiate between grants in 2022-23, this grant is called the Mainstream Schools Additional Grant and would be introduced from 1 April 2023 and would apply to maintained and academy schools. It is proposed that from 2024-25 that the additional funding would be baselined and

incorporated into the NFF values and therefore the MSAG will only be paid separately for this financial year;

- The funding would be allocated using 3 elements using data from the October 2022 census
  - i) a basic per pupil rate based upon the key stages
  - ii) A lump sum to be paid to all schools of £4,510
  - iii) A per pupil rate for FSM6 pupils (different rates for primary and secondary)
- There was an indicative allocations calculator provided on Right Choice which schools could use and the actual amounts would be confirmed in the Spring.

**Resolved:**

**That Schools Forum note the report on the Mainstream Schools Additional Grant for 2023-24.**

**10f Dedicated Schools Budget - High Needs Block Update 2023-24**

Marie Taylor (Head of Finance – Children and Education) referred to the revised report and appendices circulated with the Agenda supplement which sought to update Schools Forum on issues relating to the high needs block budget for 2023-24 and the decisions that would need to be made as part of the budget setting process. Marie highlighted the following:

- The DfE made late changes to the High Needs block allocation following publication of the Agenda and so the report and appendices were updated and were contained in the Agenda supplement. The total High Needs allocation for 2023-24 was £70.918 million and a later “additional high needs” allocation of £2.942 million to fund the cost burden of energy, teachers and support staff pay and other cost pressures plus the 3.4% additional grant payable to Special Schools;
- Whilst this additional funding was welcome it would still not keep pace with our spending but the DfE have recognised the additional pressures on the High Needs block;
- The recent SEN Review did not indicate that any more money would be forthcoming and it was anticipated that the findings would be published in the summer;
- The recovery actions of the High Needs Block Working Group continue and Schools Forum monitor these in conjunction with ongoing discussions with the DfE;
- As part of the Additional High Needs funding, the DfE have allocated £2.942 to Wiltshire. After calculation of the Special Schools 3.4%

increase, it was proposed to hold this grant separately and rather than continuing to reduce the funding gap, these funds could be used to invest in early help and prevention;

- The Special Schools would receive a total funding uplift of 3.4% in full and it was planned that there would be consultation with Special Schools School Business Managers to check that the placement numbers were correct. It was not clear from the guidance if this would be baselined or was a one off grant;
- The current forecast overspend on the School Funding reserve was £34.734 million. Wiltshire had done their fair share of lobbying and involvement with the F40 group and they would be involved in the DfE's programme of intervention work - Delivering Better Value programme to start in June 2023;
- At a recent conference attended it was reported that 75% of LA's were in deficit or did not have 'Good' Ofsted inspection outcomes – the whole country was struggling with the funding of high needs; and
- Council transformational funding of £1.6 million had been earmarked to support a significant programme of change which would align with the DBV programme to facilitate financial recovery for Wiltshire;

The Salisbury Diocesan representative asked for clarity around the decision to not badge the additional grant against the in year shortfall of £16 million but to elect to invest in early help to aid long term recovery. Marie Taylor confirmed this was the case.

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

- 1. Note the pressures on the high needs block for 2023-24 and the potential options to reduce the shortfall against high needs budgets including agreeing a transfer from Schools Block to balance the high needs pressures.**
- 2. Note the investment from the local authority's transformation reserve of £1.6 million. This would pre-date and align with Delivering Better Value funding from the DfE.**
- 3. Approve the approach to deploy the additional HNB funding in 2023-24, funding the Special schools minimum funding guarantee and invest in early help, prevention and long term recovery.**

#### **11 School Budget Decisions 2023-24**

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 £452,296,572.

### Central Schools Services Block

2. Note the Local Authority Decision (Section A) to set the budget at £0.457 million for central copyright licences for 2023-24.
3. Agree as follows the Section B expenditure for the Central Schools Services:

i) Education Welfare Service	£0.221 million
ii) Asset Management	£0.206 million
iii) Statutory/Regulatory duties	£0.743 million
iv) Admissions	£0.474 million
v) Servicing of Schools Forum	£0.003 million
vi) Centrally retained Teachers additional pension costs	£0.127 million
4. 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 £0.056 million; and
  - iii) Prudential Borrowing at £0.076 million.
5. Note that these allocations allow a transfer of £0.133 million to support the high needs block.

### Schools Block – Delegated Budget

6. Agree to apply all the funding factors at the 2023-24 NFF rates.
7. Note the stability and impact of the Sparsity factor.
8. Agree to set the Minimum Funding Guarantee at a level of +0.5%.
9. Agree that the Growth fund be set at £0.533 million split as £0.1 million Infant Class Size and £0.433 million basic need.
10. Agree to transfer up to a maximum of £1.716 million (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	£57,105
ii) FSM Eligibility	£30,218
iii) Trade Union	£28,064 (total budget academies & Maintained is £76,000)
iv) EMAS & Travellers	£589,911 (Primary only)
v) Behaviour support	£694,579 (Primary only)
vi) Maternity supply	£606,825
vii) School Improvement (LAMB)	£459,000

### High Needs Block

12. Set the Minimum Funding Guarantee for Special Schools uplift at 3% between 2021-22 and 2023-24 as required by DfE guidance.
13. Set the 2023-24 funding for Special Schools to increase by 3.4% (place and top up) in line with mainstream schools as per revised DfE Guidance of 11 January 2023 (Note the use of the DfE's Supplementary funding grant of £2.9 million).
14. Note the pressures on the high needs block for 2023-24 and the potential options to reduce the shortfall against high needs budgets including agreeing a transfer from Schools Block to balance the high needs pressures.
15. Note the investment from the Local Authority's transformation reserve of £1.6m. This will pre-date and align with Delivering Better Value funding from the DfE.
16. Provide views on the approach to deploy the additional High Needs Block funding in 2023-24, funding the Special Schools minimum funding guarantee and invest in early help, prevention and long term recovery.

### Early Years Block

17. Agree to increase the current rate of 2-year-old funding to £5.75 and 3 and 4-year-old funding to £4.68 per hour.
18. Note that pay inflation will be added at 9% to the central early years' teams reflecting the above inflation pay increase in 2022-23 and the 4.5% estimate for 2023-24 financial years.
19. Note the deprivation and rurality increase to reflect current spending levels at £300,000.
20. Note that all other funding factors remain at current 2022-23 levels or funded levels.



21. Note that Inclusion Support Fund will be set at £0.359 million and that the Early Years block is to fund the Early Years Inclusion Support Fund at the current level and the High Needs Block to allocate £0.180 million to increase support available in line with the SEN strategy around prevention.
22. Agree up to £828 per child for 2023-24 from the Disability Access Fund – the local authority to passport the funding.
23. Agree to the uplift in funding for Pupil Premium to be set at £0.62 per hour – the local authority to passport the funding.
24. Agree to ensure that at least 95% of funding is passed through to providers.

12 **Confirmation of Dates for Future Meetings**

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

16 March 2023 (if required)  
8 June 2023  
5 October 2023  
5 December 2023.

13 **Urgent Items**

There were no urgent items.

(Duration of meeting: 1.30 - 3.45 pm)

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

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# High Needs Block Update

Cate Mullen

19<sup>th</sup> January 2023

# Areas of Challenge

- £34m HNB deficit in Wiltshire

## Good News

- Transformation reserve of £1.6m has been made available
- This will support the development of roles and capacity to undertake the work associated with the Delivering Better Value (DBV) programme
- Delay agreed for DBV to summer 2023 – this will enable key positions and capacity to be in place to align to the timetable for this piece of work.

## Good News

- Additional funds made available to fund the minimum funding guarantee (MFG) for special schools
- £2.9m additional HNB – consideration of early intervention approaches to utilise this
- Extension to the override for HNB deficit from central Government for a further 3 years
- Investment request/growth bid to be considered by cabinet to reflect the significant and ongoing growth within SEND