

# AGENDA

**Meeting:** Schools Forum  
**Place:** Council Chamber - County Hall, Bythesea Road, Trowbridge, BA14 8JN  
**Date:** Thursday 8 December 2022  
**Time:** 1.30 pm

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

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<b>Membership:</b>	<b>Representing:</b>
Aileen Bates	WGA - Special School Governor Representative
Lyssy Bolton	Early Years Representative
Angela Brennan	Observer - Children and Families Voluntary Sector Forum
Andy Bridewell	PHF - Maintained Primary Representative
Rebecca Carson	PHF - Primary Academy Representative
Michele Chilcott	WASSH - Secondary Academy Representative
Stella Fowler	WGA - Primary School Governor Representative
Jo Grenfell/Nikki Barnett	Observer - Post 16, Wiltshire College
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
Nick Norgrove	WASSH - Maintained Secondary School Representative
Emma Osmund	Early Years Representative
Lisa Percy	Secondary Academy Representative
Giles Pugh	Salisbury Diocesan Board of Education Representative
John Read	PHF - Maintained Primary Representative
Graham Shore	PHF - Primary Academy Representative
Trudy Srawley	Observer - Wiltshire Parent Carer Council
Ros Sutton	WGA - Primary School Governor Representative
Ian Tucker	Chair of WASSH - Secondary Academy Representative
David Whewell	WGA - Secondary School Governor Representative
Catrina Williamson	PHF - Maintained Primary Representative

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## PART I

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

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

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

### 2 **Minutes of the Previous Meeting** (*Pages 7 - 22*)

To approve as a correct record and sign the minutes of the meeting held on 6 October 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, and each question or statement should last no longer than 3 minutes. Please register with the Officer named on this agenda, and in accordance with the deadlines below.

#### Statements

Members of the public who wish to submit a statement in relation to an item on this agenda should submit this electronically to the Officer named on the agenda **no later than 5pm on Tuesday 6 December 2022**. Statements must not be defamatory, frivolous, offensive, vexatious, unlawful or otherwise improper. They must not name or identify individual service users, members of staff or members of partner agencies.

#### Questions

Those wishing to ask questions are required to give notice of any such questions to the Officer named on the front of this agenda no later than **5pm on Thursday 1 December 2022** to allow a response to be formulated. Questions are limited to a maximum of 2 per person/organisation.

### 6 **Updates from Working Groups** (*Pages 23 - 30*)

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

- Joint meeting of the School Funding Working Group and SEN Working Group – 21 November 2022
- Early Years Reference Group – 23 November 2022

7 **Dedicated Schools Budget - Budget Monitoring 2022-23** (Pages 31 - 36)

The report of Marie Taylor (Head of Finance – Children and Education) seeks to present budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2022-23 as at 31 October 2022.

8 **SEND Update** (Pages 37 - 38)

Cate Mullen (Head of SEND and Inclusion) will present a SEND update at the meeting.

9 **Dedicated Schools Grant Consultations 2023-24** (Pages 39 - 46)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to update Schools Forum on the results of the recent autumn consultations relating to de-delegation of central services and the transfer of funds from Schools Block to the High Needs Block.

10 **Local Consultation - School Improvement Services 2023-24** (Pages 47 - 50)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to update Schools Forum on the results of the recent consultation with maintained schools relating to the removal of the School improvement, monitoring and brokering grant – 2023-24.

11 **Allocation of Funding for Pupil Growth 2023-24** (Pages 51 - 56)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks agreement from Schools Forum on the methodology for allocating funding for pupil growth from the schools block growth fund in 2023-24.

12 **National Funding Formulae for Schools and High Needs - 2023-24** (Pages 57 - 60)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to ask for 'in principle' decisions from members of Schools Forum with regards to the Wiltshire funding formula for the 2023-24 year.

13 **Confirmation of Dates for Future Meetings**

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

19 January 2023 (Planned to be face to face)  
 16 March 2023 (if required) (Planned to be via Microsoft Teams)  
 8 June 2023 (Planned to be via Microsoft Teams)  
 5 October 2023 (Planned to be via Microsoft Teams)  
 7 December 2023 (Planned to be face to face).

14 **Urgent Items**

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

**PART II**

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

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## Schools Forum

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### MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 6 OCTOBER 2022 AT ONLINE MEETING - VIA MICROSOFT TEAMS.

#### **Present:**

Nikki Barnett, Lyssy Bolton, Angela Brennan, Andy Bridewell, Rebecca Carson, Michelle Chilcott, Stella Fowler, John Hawkins, Georgina Keily-Theobald, Graham Nagel-Smith, Nick Norgrove, Lisa Percy (Chair), John Proctor, John Read, Graham Shore (Vice Chair), Trudy Srawley, Ian Tucker, David Whewell and Catriona Williamson

#### **Also Present:**

Andrew Best (Head of School Effectiveness), Ben Fielding (Democratic Services Officer), Grant Davis (Schools Strategic Financial Support Manager), Helean Hughes (Director – Education & Skills), Cate Mullen (Head of SEND and Inclusion), Cllr Suzanne Wickham, (Portfolio Holder for SEND and Inclusion), Lisa Pullin (Democratic Services Officer), Marie Taylor (Head of Finance – Children and Education), Simon Thomas (FACT Programme Lead) and Cllr Suzanne Wickham (Portfolio Holder for SEND)

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#### 1 **Election of Chair**

##### **Resolved:**

**The Forum agreed to appoint Lisa Percy as Chair of Schools Forum for 2022-23.**

#### 2 **Election of Vice Chair**

##### **Resolved:**

**The Forum agreed to appoint Graham Shore as Vice Chair of Schools Forum for 2022-23.**

#### 3 **Apologies/Substitutions and Changes of Membership**

Apologies were received from Aileen Bates (WGA – Special School Governor representative), Jon Hamp (Special School Academy representative), Cllr Ross Henning (Observer – Local Youth Network), Cllr Laura Mayes (Cabinet Member – Children, Education and Skills), Ros Sutton (WGA – Primary School Governor representative), Giles Pugh (Salisbury Diocesan Board of Education), and Lucy Townsend (Director of Children’s Services).

##### **Substitutions**

Nick Norgrove is substituting for the vacancy created by the retirement of Nigel Roper. Nikki Barnett is substituting for Jo Grenfell.

### Membership changes

The Chair welcomed John Read from Lyneham Primary School who is replacing Sam Churchill as a maintained primary school representative.

The Chair welcomed Angela Brennan has joined Schools Forum as an observer representing the Wiltshire Children and Families Voluntary Sector Forum.

#### 4 **Minutes of the Previous Meeting**

The minutes of the meeting held on 9 June 2022 were presented.

#### **Resolved:**

**That the Chair approve and sign the minutes of the meeting of Schools Forum held on 9 June 2022.**

#### 5 **Chair's Announcements**

The Chair made the following announcements:

##### Change to Agenda order

Agreement had been given to move Agenda item 15 (High Needs Block update) up the Agenda to discuss after Agenda item 8.

##### Thank you and goodbye to John Proctor

Prior to the meeting John Proctor, early years representative had notified that he was standing down as the Chairman of the Early Years Reference Group and as the early years representative on Schools Forum. As well as running successful early years settings in Wiltshire, John has been a steadfast and loyal representative of his early years colleagues over many years serving as chair of the EY reference group and Schools Forum member, offering rightful challenge and scrutiny to local authority officers in setting the rates for early years and ensuring their voice is heard and valued in the forum. He will be sorely missed both on the EY reference group and on Schools Forum and we would like to thank him and wish him well in his next adventures.

##### Change to Agenda order

I have given agreement to move Agenda item 15 (High Needs Block update) up the Agenda to discuss after agenda item 8.

#### 6 **Declaration of Interests**

There were no interests declared.

#### 7 **Public Participation**



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

## 8 **Updates from Working Groups**

The Forum noted the update received by way of the minutes of the joint meetings of the School Funding and SEN Working Group held on 11 July and 23 September 2023. There were no questions arising.

The Forum noted the update received by way of the minutes of the meeting of the Early Years Reference Group meeting held on 3 October 2022.

Cllr Suzanne Wickham asked for more information on the 72 children that were currently staying in early years settings when they ought to be in school – was it that the parents or settings or both deeming that these children were not ready – was it a SEND issue or a socialisation issue following Covid and had portage been considered?

Helean Hughes (Director – Education & Skills) responded that she would ask the Officer (Emma Cooke – Service Manager – Early Years) who had tabled that item to provide a written response to the questions raised and these could be shared with the minutes of the meeting.

### **Resolved:**

**That Schools Forum note the minutes of the joint meetings of the School Funding and SEN working group held on 11 July and 23 September 2022 and the meeting of the Early Years Reference Group held on 3 October 2022.**

## 9 **Wiltshire Schools Forum Proportionality, Membership and Terms of Reference**

Lisa Pullin (Clerk to Schools Forum) referred to the report which sought approval of the membership of the Forum, and to revisions of the Terms of Reference in light of the review of proportionality that was carried out in September 2022, and highlighted the following:

- Grant Davis (Schools Strategic Financial Support Manager) carried out a review of the proportionality of the Forum in September 2022 and whilst there was a change to pupil numbers, this did not equate to a change needed in the representative proportionality of the Forum;
- The last change to the representative proportionality was made in October 2021 when the primary representation changed from 4 maintained and 2 academy reps to 3 maintained and 3 academy reps;
- The current membership of the Forum detailed on pages 26/27 of the Agenda showed the current vacancy for a maintained secondary representative following the retirement of Nigel Roper and it was

expected that a new representative would be notified from WASSH as soon as possible;

- The Forum had also today been notified of John Proctor (early years representative) standing down and so there was also a vacancy for that position to be appointed by the Early Years Reference Group;
- Whilst there were changes to the Forum's membership proportionality in October 2021, the Terms of Reference have not been updated since October 2019 so the opportunity was now being taken to update these to show the revised membership breakdown, the procedure for submitting a statement to the meeting and the details of how meeting minutes are disseminated; and
- If the changes were approved by the Forum the next step would then be for the Cabinet Member for Children, Education & Skills to approve this through the delegated decision process.

**Resolved that Schools Forum:**

- a) Note that the proportionality of the Forum has been reviewed and that no changes are recommended.**
- b) Agree the revised Terms of Reference and endorse the proposed changes, requesting that that these then be presented to the Cabinet Member for Children, Education & Skills for approval through the delegated decision process.**
- c) Notes the current Membership details of the Forum.**
- d) Requests that the following representatives be appointed as soon as possible for the current vacancies:**
  - i) Maintained secondary school representative (appointed by WASSH)**
  - ii) Early Years representative (appointed by the Early Years Reference Group).**

10 **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 31 August 2022 and highlighted the following:

- The overspend forecast of £7.037M was already out of date as at the end of September – the main driver for this was the ongoing pressures on the high needs block, the reasons for which are known and understood and work was ongoing;
- There was a forecast underspend of £2,366M on the early years block and this was due to the demand and the budget being based on the previous year's numbers of take up. There were also low birth rates

forecast in the county which may contribute. This underspend is unavailable to be used by the LA as it would likely be all recalled by the DfE as part of the post financial year adjustment;

- Early years Officers have submitted a bid to the Director of Public Health for more COMF grant funding to support early years settings. This was being discussed by the Corporate Leadership Team today and it was hoped that this would be successful – an update would be shared at the next meeting;
- The forecast underspend on the schools block largely related to the school supply cover fund which currently shows a forecast underspend and is helping to offset the overall pressure on the DSG;
- The high needs block was due to overspend and the figure had risen from £9.414M in September 2022. The biggest areas of overspend were Independent Special School packages, alternative provision, named pupil allowances and top ups. 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;
- Following the pandemic, when professionals could not assess children and young people in school, EHC assessments were delayed due to inevitable backlog. Whilst Officers had put in place temporary support funding to support learners, they had not seen the same rate of growth in plans, and the assumptions around future plans would need constant adjustment to be as accurate as possible;
- There was a small forecast overspend in the central schools services block driven by a higher than budgeted pay award and not achieving the 6.5% vacancy factor;
- The DSG reserve brought forward of £25.973M is increased by the positive early years block adjustment of £0.564M. The forecast overspend would take the reserve in to an overall deficit position of £32.446M; and
- At their meeting on 3 October 2022, the Early Years Reference Group considered the limited one off usage of the early years contingency fund a project to support children for school readiness and support for vulnerable early years pupils with additional needs to reduce the pressure on the primary sector. This will be raised at the high needs recovery group.

**Resolved:**

**That Schools Forum note the year end budget monitoring position as at 31 August 2022 in conjunction with the high needs recovery plan.**

11 **School Revenue Surplus and Deficit Balances 2021-22**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which presented the position of revenue balances for Wiltshire maintained schools as at 31 March 2022 and identified those in surplus and deficit and highlighted the following:

- The last couple of years had been financially difficult for some schools and there had been certain funding that had been received but they were not able to spend – this had had a knock on impact for some school's balances;
- The net surplus balances for the financial year 2021/22 were £13.3M with 110 schools holding surplus balances of £15.9M and 13 schools in deficit to a value of £2.57M;
- The number of LA maintained schools had decreased from 126 to 123 between 31 March 2021 and 31 March 2022 – the data did not include those schools which had covered during the financial year;
- The DfE may ask local authorities to provide additional information where:
  - a) the authority has 5% of schools that have had a surplus of 15% or more for the last 5 years and where the individual surplus is least £10,000 each year. Authorities will only be asked for more information if at least 3 schools meet the criteria.
  - b) the authority has 2.5% of its schools in deficit by 2.5% or more for the last 4 years and where the individual annual deficit is at least £10,000.
- The number of schools in deficit had remained the same at 13 for 2021-22 and the value of the deficits had decreased by £0.15M from £2.72M in 2020-21 to £2.57M in 2021-22;
- The number of schools in surplus had decreased from 113 in 2020/21 to 110 in 2021/22. This was due to 3 schools with surplus balances converting to academy status. The value of surpluses increased by £1.53M, from £14.39M in 2020/21 to £15.92M in 2021/22;
- For those schools with surplus balances for more than 5 years they were being encouraged to explain why – most schools had a reason for the surplus i.e. they were saving up for a capital project and that the surplus balance would be planned to drop down once spent; and

- The appendices to the report highlight that the Authority may trigger an investigation from the DfE due to the number of schools holding excess revenue and deficit balances – many schools were still holding large surplus balances following the pandemic and the additional funding granted to support schools.

**Resolved:**

**That Schools Forum note the report on Schools revenue surplus and deficit balances for 2021-22.**

12 **Families and Children's Transformation Programme (FACT) Update**

Simon Thomas (FACT Programme Lead) gave an update to the Forum on the FACT programme - in particular the Wiltshire multi-agency Family Help arrangements and highlighted the following:

- That the current picture showed that the key areas of demand related to: SEND, ASD pathway, children and young people's behaviour (at home and school), emotional well-being, gaps and social mobility;
- Whilst partners agreed that there was much in the way of good practice, there were also practice/system issues identified: Insufficient lead professionals, inconsistent holistic whole family practice, an unclear early help offer, limited flexibility in how/when/where to access support, a degree of a lack of family confidence in some services and a lack of coherence between 'youth offer' and early help;
- The feedback from families was shared and the programme had identified that there was an opportunity to work together and improve the way the system works. The Family Help initiative would seek to ensure Wiltshire's multi-agency Family Help arrangements enable children, young people and families to access the right help at the right time through a co-ordinated approach to prevention and early intervention through:
  - a co-ordinated approach at a whole population/universal level to prevent needs from arising and to build resilience across all residents
  - a robust multi-agency approach to spotting any additional needs at the earliest point and providing effective joined-up support that prevents the needs from escalating further
- They had committed to a programme of work so that there was a clear unifying brand for Family Help with a single online database of all services, community resources and activities. There would be a co-ordinated whole system workforce development offer to ensure that there was a consistency of core approaches across the Early Help workforce;

- It was planned to pilot these approaches to start in Warminster and Westbury who will also develop and test the benefits of:
  - Wrapping a dedicated group of identified Early Help services and community groups around a cluster of schools/settings; embedding them in the communities they serve;
  - Establishing a local contact point for Early Help requests for support and case discussion whereby the responses make best use of local resources including the voluntary and community sector;
  - More flexible working practice with core workers delivering intervention in the place, way and time that achieves best impact e.g. home, school, online, group, breakfast time, evening;
  - A locally led inclusive and welcoming local community of practice for Early Help – responding to local needs, identifying and sharing learning and good practice, engaging in reflective dialogue related to the pilot activity, promoting and delivering agreed culture and practice change activity;
  - Securing strong transition with a focus on pupils that need it most and joining up where siblings span multiple schools;
  - Specialist input on key themes including mental health, ASD, parental conflict and challenging behaviour – delivered locally and taking account of the local context;
  - Local consultation mechanisms to ensure that we understand the needs and lived experience of children and families in Warminster and Westbury;
- This would be a two year pilot for Warminster and Westbury but they would not wait two years before they started to share the findings. There would be a Steering Group in the two towns for all key stakeholders and also a Wiltshire wide Steering Group.

**Resolved:**

**That Schools Forum note the update on the FACT programme.**

**13 Consultation - National Funding Formulae for Schools - 2023-24**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which confirmed the response on behalf of Schools Forum members to the DfE's second stage consultation regarding the National Funding Formula for Schools and highlighted the following:

- The DfE released the 'Implementing the Direct National Funding Formula' consultation on 7 June 2022 with a response date by 9 September 2022;
- A special meeting of the Schools Funding and SEN Working Group was convened on 11 July 2022 to prepare a response on behalf of Schools Forum members;

- The consultation focussed on the following areas of school funding:
  - a. Transfer of funding between ‘blocks’
  - b. Indicative SEND budgets
  - c. Growth and Falling Rolls funding
  - d. Premises funding – Split Sites
  - e. Premises funding – Exceptional Circumstances (rent of facilities)
  - f. Use of the Minimum Funding Guarantee
  - g. The annual funding cycle
  - h. De-delegation
  
- The response on behalf of the Forum was submitted by the deadline and now the outcome following the consultation is now awaited to see the implications for the 2023-24 financial year and what changes the DfE may make based on the feedback received.

**Resolved:**

**That Schools Forum note the contents of the report on the DfE’s second stage consultation regarding the National Funding Formula for Schools.**

14 **National Funding Formula for School and High Needs 2023-24**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which outlined the DfE funding proposals for schools and high needs in 2023-24 and highlighted the following:

- The indicative allocations for the 2023-24 budget had been given by the DfE and they had continued to allocate funding on the basis of the National Funding Formula (NFF). The 2023-24 year would be another “soft” year with Schools Forum still retaining its role in determining the school funding allocation methodology;
- The 2023-24 year will be the first transition year towards the direct schools National Funding Formula (NFF). A tightening of the of the formula was confirmed following the first stage of the government’s consultation on the direct NFF. This tightening will ensure that for the 2023-24 year that:
  - Only NFF factors can be used in the local formula
    - All NFF factors must be used in the formula
    - LA’s are required to move their formula 10% closer to the NFF values
- Wiltshire’s local school formula already mirrors the NFF – therefore the tightening will have a minimal impact upon Wiltshire schools;
- The indicative allocations are based on the October 2021 census which also formed the basis of the 2022-23 allocations;

- The main formula for the 2023-24 year is broadly similar to the formula for 2022-23 year, the main changes are below:
  - a) Overall, funding through the NFF will increase by 1.9%
  - b) Core pupil-led funding factors and the lump sum to increase by 2.4%
  - c) Disadvantaged funding, FSM6 and IDACI factors to increase by 4.3%
  - d) The 'Minimum per pupil funding level' to increase by 3.3% to £4,405 for Primary and £5,715 for Secondary
  - e) The School Supplementary Grant from 2022-23 has been rolled into the baseline funding and then inflated by the relevant % increases.
  - f) Increasing the DfE's High Needs funding by £570m or 6.3%
- The DfE are expecting to move to the Direct (Hard) NFF by the 2027-28 funding year at the latest. All NFF factors will be mandatory from 2023-24 and the formula will be presented to Schools Forum when the final allocations have been confirmed in December 2022 and then to the Local Authority for political ratification and approval in February 2023;
- The growth funding is based on the growth in pupils in the MSOA between the October 2022 and October 2021 census and will attract funding at £1,520 per primary pupil and £2,275 per secondary pupil;
- Initial modelling of the allocations show that all formulas should be affordable. The usual consultation about de-delegation of services was currently out and the findings would be brought back to the next meeting in December.

An Early Years representative asked about distributing the grant centrally not through LA – and if de-delegation would disappear or be delivered through a trading company. Grant Davis responded that we would find out in due course as part of the consultation sought responses regarding the future of de-delegation and whether this should continue. If there were enough maintained schools interested in continuing with de-delegation, they would need to look at benefiting from the economies of scale of having the services delivered centrally. Academies were also being asked if they would wish to buy in (as a traded service) and it was expected that this would continue as long as the services could be provided by the LA's teams.

**Resolved:**

**That Schools Forum note the contents of the report on the DfE funding proposals for schools and high needs in 2023-24.**

#### 15 Update from the High Needs Block Working Group

Cate Mullen (Head of SEND and Inclusion) gave an update on behalf of the High Needs Block working group and referred to the minutes of the meeting held on 7 July 2022. Cate highlighted the following:



- Three DfE documents were published in June/July 2022 relating to creating sustainability in high needs and these had been discussed by the working group;
- A total of ten recommendations were highlighted in the documents and the High Needs Block working group focused on the following three at their meeting on 11 July 2022:

**Recommendation 6:** Local authorities should review and further develop their approaches to partnership with key stakeholders, taking into account some of the positive practices described in this report (in addition to any broader policy emphasis on this area).

**Recommendation 8:** With regard to developments in local mainstream provision, investment should be targeted at strengthening inclusion, with impact monitored and evaluated at that level.

**Recommendation 9:** Local authorities should set out more clearly their expected pathways for young people with different levels of need, ensure that these are presented earlier and more clearly to young people and their parents, and evaluate quality and outcomes on a more regular basis. Pathways should be realistic but ambitious.

- One of the two DfE programmes run was the Safety Valve Programme which was available to the local authorities with the highest high needs deficits. There were two principal goals identified during the programme which were crucial for the LA's ability to reach sustainable positions were:
  - appropriately managing demand for Education, Health and Care Plans (EHCPs), including assessment processes that are fit for purpose
  - use of appropriate and cost-effective provision - this includes ensuring mainstream schools are equipped and encouraged to meet needs where possible, whilst maintaining high standards for all pupils
- It was identified that achieving those goals required: Early intervention focus, increased SEN support offer, a review of EHCP assessment processes and thresholds, culture change and work with school leaders and appropriate and through provision mapping, with potential development of more local provision;
- Delivering Better Value was a new programme that aims to support LA's to improve delivery of SEND services for children and young people while ensuring services are sustainable. This programme will provide dedicated support and funding to 55 LA's with less severe deficits than those in the Safety Valve programme of which Wiltshire is one of them. Newton Europe, in collaboration with the Chartered Institute of Public Finance and Accountancy (CIPFA), will work with the DfE to deliver the programme;

- The DfE was engaging with Schools Forums as part of the development of the programme and it was expected that local Schools Forums would be consulted as part of the diagnostic phase;
- There were three tranches to the programme and Wiltshire are part of tranche 2 which was starting to be set up now with the diagnostics running from February to July 2023. The work of the programme would be completed by April 2024. The first tranche going through the diagnostics now were seeking detailed information at a child level to understand the patterns and trends in how the use high needs block funding.

**Resolved that Schools Forum:**

- 1. Note the minutes of the meeting of the High Needs Block working group held on 7 July 2022.**
- 2. Note the update on behalf of the High Needs Block working group.**

**16 Confirmation of Dates for Future Meetings**

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

8 December 2022 (planned to be face to face at County Hall, Trowbridge)  
 19 January 2023 (planned to be face to face at County Hall, Trowbridge)  
 16 March 2023 (if required).

**17 Urgent Items**

Prior to the start of the meeting the Chair had agreed that a report entitled “Local Consultation – School Improvement Services 2023-24” could be shared with Schools Forum under agenda item 17 – Urgent Items. The report which sought to update Schools Forum with the results of the recent consultation with maintained schools relating to the removal of the Local Authority Monitoring and Brokering Grant 2023-24 was shown on the screen and the meeting and then circulated post meeting via Agenda supplement 2 on 11 October 2022.

Grant Davis (Schools Strategic Financial Support Manager) referred to the report and highlighted the following:

- The DfE released its consultation on *‘Reforming how local authorities’ school improvement functions are funded’* in late October 2021. The two key questions of the DfE consultation were to:
  - a)** Remove the Local Authority Monitoring & Brokering Grant (LAMB), which is currently allocated to local authorities to support school improvement activities; and
  - b)** Make provisions within the School and Early Years Finance (England) Regulations for the financial year (FY) 2022-23 to allow local

authorities to fund all their school improvement activity (including all core school improvement activities) via de-delegation from schools' budget shares.

- The LAMB has been provided to local authorities since 2017, to help fulfil their core improvement activities, which was based upon the number of maintained schools. The proposals from the DfE, to reduce the grant by 50% in 2022-23, with full removal in the 2023-24 year were approved, following the consultation. As a result, Wiltshire's funding fell from.
  - a. £459,000 in the 2021-22 year
  - b. £229,500 in the 2022-23 year
  - c. £0 for the 2023-24 year
- Local authorities were provided with the opportunity to fund improvement services through either de-delegation of maintained schools' budgets or on a traded basis. To provide Schools Forum with a steer, a local consultation was arranged to provide a basket of options for potential funding of the loss of the LAMB grant. In January 2022??? maintained members of Schools Forum agreed to de-delegate monies from their budgets, to cover the drop in funding for the LAMB. This de-delegation was agreed to ensure that School Effectiveness service provided to maintained schools would not be compromised;
- To provide Schools Forum with information, a local consultation was arranged to provide several options with schools being asked to rank each of the options in order of priority. This consultation was open to all maintained schools and a total of 11 responses were received – 1 secondary school and 10 primary schools. The options for schools were as below:

<b>Option</b>	<b>Impact</b>
Schools don't fund any loss of LAMB	Reduction in Services - £459k
Schools fund 50% loss of LAMB	Reduction in Services - £229.5k
Schools fund 75% of LAMB	Reduction in Services - £114,8k
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k
Schools fund 100% of LAMB	Existing service maintained

- Eight of the schools so that no funding for the loss of the LAMB grant was their least preferred option, five schools expressing a preference for the existing service to be maintained with schools funding 100% of the

LAMB and four schools preferring to continue at the current funding level with 50% of the costs being funding by schools in 2023-24;

- The consultation sent to maintained schools only closed on 5 October (day before the meeting) hence why this report was not able to be shared with Schools Forum in advance of the meeting with the Agenda papers;
- The views of Schools Forum were being sought as to their feelings on the funding of the LAMB grant going forward;

The Chair asked when would a decision need to be made by the maintained schools in relation to the LAMB grant? Grant Davis ??? responded that Officers needed to have information as soon as possible in order for them to be able to shape the School Effectiveness Teams etc and whilst the timescale was quite short they fully accepted that this was not a long consultation period and that Schools Forum members may wish to go away and have conversations with their maintained school colleagues before giving their views on these issues.

A primary school Governor representative felt that the response of only 11 schools was low and that with no prior notice she would not be happy for a decision to be made as it was an important decision and so suggested that the consultation be extended in order for more maintained schools to be given the opportunity to respond and share their views.

Grant Davis responded that they do not usually see a big response in consultation in relation to de-delegation and would think that a 30% response was good – however he accepted that the 10% response in this case was low. Grant agreed that the consultation could be extended and that they could look at all avenues of getting the information out to schools to hopefully get a better response. It was confirmed that the consultation was shared with the recent Headteacher/Governor/School Business Manager briefings.

It was suggested that the consultation could be raised at WASSH and PHF meetings next week to encourage further consultation responses.

Helean Hughes (Director – Education & Skills) confirmed that the consultation could be extended as they did want to hear from as many schools as possible to enable an informed decision.

Andrew Best (Head of School Effectiveness) suggested that they could look to hold an engagement session with schools before the end of term.

#### **Resolved:**

**That the consultation on the future of the LAMB grant be extended on Right Choice and Officers would attempt to arrange an engagement session for maintained schools to attend before the end of Term 1.**

*Post meeting admin note - A final decision will be taken in the December 2022 Schools Forum meeting, however by extending the consultation period, a greater response rate is anticipated to provide an indicative position for the Maintained Schools representatives to consider.*

*An indicative position will help steer the Director of Education and Skills and her team to strategically plan for the future delivery of the service.*

(Duration of meeting: 1.30 - 3.25 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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## Schools Forum

### School Funding and SEN Working Group

#### MS TEAMS MEETING

**21<sup>st</sup> November 2022**

#### Minutes

**Present:** Marie Taylor (Chair), (Finance, local authority ((LA)), Grant Davis (Finance, LA), Cate Mullen (Head of Inclusion & SEND, LA), Lisa Percy (Chair of SF / Hardenhuish), John Hawkins (Teacher / Governor rep), Catriona Williamson (Mere) Phil Cooch representing Georgina Theobald-Kiely (Downlands) John Read (Lyneham) Graham Nagel-Smith (Morgan’s Vale & Woodfalls), Graham Shore (Deputy Chair SF / Holy Trinity)

**Apologies:** Helean Hughes (Director LA), Andy Bridewell (Ludgershall Castle), Simon Thomas (LA), Gary Binstead (LA), Rebecca Carson (Woodford Valley)

1.	<p><b>Welcome and Apologies</b></p> <p>MT welcomed the group to the virtual meeting and explained that some members would be late or absenting themselves for part of the meeting due to school commitments.</p>	
2.	<p><b>Minutes</b></p> <p>There were no outstanding actions.</p>	
3.	<p><b>Matters Arising</b></p> <p>There were no matters arising.</p>	
4.	<p><b>High Needs Update – (CM)</b></p> <p>CM provided a verbal update with slides focussing on the local authority’s enrolment in the DfE’s “Developing Better Value” programme of support and funding to assist with recovery plans. Starting with a 6 month diagnostic starting in January 2023 followed by an 18 month implementation – collaborative, supportive approach with oversight from Schools Forum continuing. Local authorities with more significant relative pressure are asked to take part in the DfE’s “Safety Valve” programme. Link to DfE website below:</p> <p><a href="https://publishing.service.gov.uk/guidance/2022/10/11/guidance-on-our-intervention-work-with-local-authorities-october-2022">Guidance on our intervention work with local authorities - October 2022</a> (<a href="https://publishing.service.gov.uk">publishing.service.gov.uk</a>)</p>	
5.	<p><b>Autumn Consultations (GD)</b></p> <p>GD shared the consultation results with the group. Responses were at the usual relatively low levels and the group discussed whether there was more to be done in the future to encourage a higher response rate, current practice some felt there was a high level of trust in Schools Forum colleagues in making decisions on their behalf and others felt higher engagement would benefit.</p> <p>In addition to the consultation - discussions with primary and secondary heads around the LAMB indicated a 100% de-del model would be approved.</p> <p>Decisions will need to be made in principle in December and once the actual allocations are received, the final budget set in January –</p> <ol style="list-style-type: none"> <li>a. to transfers between blocks,</li> <li>b. de-delegation, (and</li> <li>c. minor formula factors not aligned to the NFF)</li> </ol>	

6.	<p><b>Schools Funding (DSG) Budget Monitoring (MT)</b></p> <p>MT shared her report &amp; appendices – highlights, underspends in EY will be subject to a post financial year adjustment in June/July 2023 by the DfE. Schools block small underspend offsets the HNB pressures. HNB pressures in line with demand for services and previous years demand patterns – as shared at the last meeting, the focus on assessments and September placements means that the latest forecast is significantly increased from the previous forecast shared.</p> <p>LP reminded the group that Devon’s DSG deficit was £124m.</p> <p>Joint schools and local authority recovery work in this area on going and progress in this area was shared as item 4, above.</p>	
7.	<p><b>Growth (GD)</b></p> <p>GD shared his report and the group discussed issues such as the falling birth rate, LP suggested we retain status quo re: falling rolls due to this national and local trend.</p>	
8.	<p><b>NFF Schools &amp; high Needs Blocks 2023-24</b></p> <p>Headlines £2.3bn nationally which is reduced by £0.3bn to reflect the social care levy funding – now not required to fund national insurance increases, hard formula by 2027-28 and a tightening between now and then for LAs who are not, like us, largely aligned to the NFF</p> <p>The in-principle decisions in December will be voted on in January and ratified by Full Council in February 2023 alongside the Councils revenue and capital programmes.</p>	
9.	<p><b>AOB (GD)</b></p> <p>GD asked the group if there were any updates from the teaching unions on pay negotiations. JR reported union members were in favour of industrial action JH agreed it did appear members were edging more towards action. JR reported NHT members worried about closing schools so action may not necessarily be a strike.</p> <p>Academisation was discussed and the government agenda for all schools to become part of a MAT by 2030 – the messaging is that the white paper may not convert to the Education Bill. GS said he attended a RSC round table, there is a delivery team of 3 in the SW and the SW has some of the lowest performing MATs in the county – there does not appear to be a massive appetite to progress.</p> <p>MT asked the group if they were happy to meet face to face for the December meeting as planned – consensus was to do so.</p>	
10	<p><b><i>Date and Time of Next Meeting</i></b></p> <p>The next Schools Forum meeting after our December meeting will be <b>Thursday 19<sup>th</sup> January 2023 @ 1.30pm</b>. This is planned as a face-to-face meeting.</p> <p>The date of the next meeting of this group is scheduled for <b>Monday 9<sup>th</sup> January 2023 at 8.30am</b>. This is planned as a virtual teams meeting.</p>	



**Early Years Reference Group Meeting  
Wednesday 23<sup>rd</sup> November 2022**

**1. Welcome and introductions**

Lyssy Bolton (LB), Jane Boulton (JB), Lucy-Anne Bryant (LAB), Rosemary Collard (RC), Emma Cooke arrived 1.40pm (EC), Jenny Harvey (JH) (notes), Sarah Hawkins (SH), Deborah Muir – arrived 1.25pm (DM), Emma Osmund (EO) (Chair), Emily Wood (EW)

**2. Apologies**

Gary Binstead (GB), Marie Taylor (MT), Russ Martin (RM) and resignation, Claire Shipley (CS)

**3. Minutes of last meeting (3 October 2022)**

All agreed as true and accurate.

**4. Matters arising**

LAB has heard that John Proctor is well and recovering. LAB asked if the group would like her to send some flowers on the group's behalf. All agreed. *Update 29.11.2022 – Flowers were delivered today.*

LAB thanked Russ Martin for his involvement in the group and wished him well.

Item 5 – Conversation took place.

Item 6 – No email text received from JP, and JH is yet to identify EYRG representative gaps

Item 7 – Terms of Reference amended

Item 8 – HNB Recovery group action will be covered in MT's Finance Briefing later in the meeting. MAT task to be carried forward, and LB and EC to meet up.

Item 9 – MT briefing done. EW confirmed she needs to double check when the next occupancy survey is due to issued and adjust accordingly.

Item 11 – Response has not been received to date.

Item 12 – LAB expressed thanks to all those who had accepted/ were sending a representative.

JB expressed confusion at the date for the meeting. LAB confirmed it was Monday 28<sup>th</sup>/29 November afternoon, 3.30-5.20pm. LB echoed JB's confusion. LAB to resend message to invitees.

Item 8 - SH wanted to know what was happening about the 72 children who ought to have been in school, but are still in EY provision. Affected families appear to be getting very little support from SEND team. The EYIA's are doing a great job, but it's an ongoing problem. LAB confirmed that Kai Muxlow is aware of the issues and is looking into them.

**ACTION:**            **JH to remind LAB re: sending flowers to John Proctor**  
                         **JH to identify sector gaps on EYRG representation**  
                         **LAB/EC to raise school aged children in EY provision issue with Kai Muxlow**

**5. Budget Monitoring 2022-2023 and brief timetable and plan of budget setting (MT)**

LAB shared MT's Finance Briefing with the group (attached).

JB queried what the £2.190m underspend for 3-4yos equated to; LAB confirmed it was 959 PTE as shown in the table.

EW confirmed that the figures are all based on the previous year's census, so this is only a forecast. The Local Authority only gets paid for what is delivered.

EW highlighted that the pertinent line was the EY adjustment line and is to be put towards 'Invest to Save' uses. JH will seek clarification from MT and send out with the minutes. *Clarification from MT 29.11.22 - MT confirmed that this older part of the surplus variance (£1.692 (21/22 balance b/f) plus £0.564 (EY adjustment*

21/22)) is being used to fund some early help/ preventative programmes. Feedback from the group was that their preference was a central resource. EC was going to explore ideas.

LAB reported that she, EC and GB have had a strong conversation with the DfE about EY being completely missed out on the Autumn Statement. What does this say to a sector already feeling underfunded and undervalued? There is nothing to encourage anyone to join the EY sector, and the cost of living crisis is making EY even more unappealing. She will be taking the issues to Michelle Donelan and John Glen along with a breakdown of funding, the number of settings within the county as well as sufficiency data. EW stated that the Local Authority will capture sufficiency data from settings, and share with DfE as hard evidence that we are not meeting sufficiency demands.

There was wide discussion by the group about:

- significant recruitment and retention issues
- occupancy rates and sufficiency
- lack of value afforded the sector and the professionals working within it
- changing of ratios
- increasing numbers of children with significant behaviour issues
- increasing numbers of children with development issues.

LAB and EC confirmed that senior directors within Wiltshire Council are actively involved with the development of a new EY Strategy which will underpin all activities. LAB said that all views and experiences are being passed onto the DfE and confirmed the local authority is doing everything it can. She suggested inviting the DfE to meet with EYRG members as perhaps a face to face meeting might have more impact.

LB reported that problems being faced by schools are no less significant than those being experienced by EY providers. The issues are universal and painful. In one of her school settings, she has had to redeploy a deputy HT out of school to manage the quality in EY provision; this just cannot be sustained long term.

EC reported that she went to a DfE regional event yesterday and all local authorities are saying the same about recruitment and retention and experiencing the same issues as here in Wiltshire. The topic of local authorities meeting sufficiency duties through hubs was raised.

**ACTION:** JH to seek clarification from MT on EY Adjustment line in DSG Reserves table and add to minutes. *(Minutes updated with MT clarification)*

## 6. COMF monies 2022-2023 (MT)

This item was deferred to the next meeting scheduled for Friday 6<sup>th</sup> January 2023.

**ACTION:** None

## 7. ISF – financial challenges and sustainability (EO)

EO reported that they are finding more and more children are attending their provision but are unable to attend without 1:1 support. They are applying for ISF, but that won't meet the needs of these children. More children are becoming increasingly more challenging with significant behaviour issues. They are worried about the safety of their staff and children. EO has been told that their reports are being rejected as EY provider staff are not considered as professionals.

EC confirmed that all Spring 2023 applications have been managed by the EY team since 1 September 2022, with a new process in place. EC is having to monitor spend, and is not sure if it has been as carefully monitored in the past. The budget is currently £70k overspent with more children coming through. Children appear to have been set on the wrong bandings. There is discussion about what the local authority could offer. Are different bandings needed with more funding going to higher needs children and less going to lower needs children? With the extension of funding covering the 30 hours now, do we need to focus on funding for 3&4yos only and remove funding from 0-3yos? EC confirmed they are also looking at what other local authorities offer.

Spring 2023 applications had to be submitted by 31 October 2022, and funding will be paid by 16 December 2022 in advance of the term starting. Late applications are not being processed.

SH has a child attending one of their settings who didn't have a 2yo check, and has significant needs. She is concerned she won't be able to get anything in place for the child in September 2023. There are EYIA observations and setting professional s involved. EC advised SH to liaise with Gemma Paice on how to submit an application.

**ACTION: SH to liaise with Gemma Paice**

#### **8. Ukrainian support for 2-4 year olds (EC)**

EC confirmed we have got children living around the county and accessing EY provision, and we are being updated as families come into the county. It's been identified that Ukrainian families are tending to go to more affluent areas of the county where host families live in larger properties with annexes. However, there tends to be less childcare in these areas as a lot of them are more rural and don't have good transport links; this is causing some challenges. In addition, we are now getting towards the end of the initial 6 month period, we are seeing that relationships are breaking down. The Ukrainian families need to move out independently or to a new host family, but they are wanting their children to continue attending their current childcare provision which is not always possible in the more rural areas. We are seeing lots of transitions between settings for children.

EC reported that the number of families in Wiltshire has been reasonably steady, although we are expecting more families to come through.

There is a bridging hotel in the north of the county which has housed Afghan families, and it is likely that that this will start to get refilled with more families. Unfortunately, there are no transport links near hotel, and an added issue is that there is no EY education/childcare sector in Afghanistan so potentially we will have children starting school who have had no early years education. It is an evolving picture with rurality being the principal issue and the infrastructure not being there to support everyone.

LAB confirmed that clear guidance has been sent out to the sector on who can claim EYE.

**ACTION: None**

#### **9. LPA Update (LAB)**

The LPA was updated in March 2022 with updated funding amounts for 2022/2023 EYPP and DAF. LAB reiterated that DAF is paid as a lump sum to one nominated EY provider. Whilst uptake of DAF has increased, we still wish to encourage providers to keep applying for the funding if they have eligible children who need it and aren't accessing it at another provider. All entitlements will be promoted by health visitors in their letter to parents.

EW confirmed that the 'updated' line on the title page of the LPA needs to be amended to reflect March 2022, not September 2021.

EW reported that the issue of artificial breaks/charging for the lunch hours has been brought to her attention by a parent. This guidance, whilst not in the LPA, is included in the DfE statutory guidance, and EW asked the group for their permission to add to the LPA and upload the new version onto the Wiltshire Council website. There were no objections from the group.

LB stated that the guidance says where practical, artificial breaks are to be avoided, and therefore the local authority cannot enforce. It would not be fair to enforce it. All agreed that further clarification was needed from the DfE.

**ACTION: EW to contact DfE for further clarification on artificial breaks  
JH to amend 'updated' line on title page of LPA**

## 10. Any Other Business

LAB reported that there is an ongoing COMF piece of work to improve outcomes for children who are slightly delayed due to covid.

LAB informed the group about a recent challenge and ruling against Nottinghamshire County Council on funding from the Local Government and Social Care Ombudsman. Local authorities understand why providers need to charge additional fees, however all fees must be clear and transparent to parents. We have to ensure our providers are adhering to the LPA and statutory guidance. Where providers aren't adhering to the guidance, the local authority does receive parental comments and complaints. Every query is answered. EW deals with all complaints directly, and we always ask if the parent has spoken with their provider first about their concerns. We are increasingly receiving more of these complaints as providers are trying to find more ways of funding their businesses. The issue of fees and charges is being raised at regional and national events, and the local authority needs to consider how it is going to manage this going forward.

SH confirmed that they are now having to look at introducing additional charges across all 7 of their military settings. This will be a new experience and shift in culture for their parents, as they have never had to pay for meals before. There will potentially be lots of complaints. LAB/EW confirmed that whilst providers can charge for meals, they cannot force parents to buy a meal.

DM informed the group that they introduced an optional charge for meals two years ago. Now, all 40 of their children have meals with no packed lunches at all.

**ACTION: LAB to follow up with EC on COMF piece of work**

## 11. Date of next meeting

The next meeting is scheduled for Friday 6 January 2023 at 3pm.

## Finance Briefing – EYRG 23-11-2022

My apologies for not attending in person, today, I received a late invitation to attend a National Funding Formula Conference with workshops in two areas of concern / interest for me:

Workshop 1 – the combined Financial Implications of the SEND Green Paper & High Needs Safety Valve.

Workshop 3 - Early Years Sufficiency, Covid Impact on Schools' Readiness and Funding Trends – this is particularly pertinent to this group and so I hope to update more when we next meet and will share any useful updates with Emma & Lucy-Anne on my return.

### ***Budget Monitoring 2022-23***

With regards to the current year's position – the underspend is as a result of lower take up than the DfE allocation (based on the previous years' census data) – and we know this will be adjusted in the next financial year. We discussed last time we met pandemic or, increased need more generally and utilising some of the older underspend to ensure some EY children were more school ready, able to manage their emotions and be better placed to self regulate – Emma has a slot on resources later in the agenda and will be able to update you more widely.

### ***Early Years Budgets (Budget £31.047M, forecast variance (£2.386M))***

Although this is forecast, it is anticipated that the DfE's post financial year adjustment will adjust for this in whole or, part in the 2023-24 financial year if the January 2023 census numbers fall.

	<b>Budgeted PTE</b>	<b>Forecast PTE</b>	<b>Forecast PTE Variance</b>	<b>Budgeted Spend £M</b>	<b>Forecast Spend £M</b>	<b>Forecast spend Variance £M</b>
2-year-olds	828	759	(69)	2.686	2.461	(0.225)
3- & 4-year olds	10,738	9,779	(959)	27.055	24.865	(2.190)
ISF	2,826 (hours)	3,240 (hours)	414 (hours)	0.537	0.616	0.079

This is the extract from the DSG reserve and the funding available to support the “invest to save” approach we discussed with an aim of reducing requests for plans but to fund central resource to support settings and pre-school children.

<b>DSG Reserve</b>	<b>Early Years Ringfence (effective 01-04-22)</b>	<b>Schools Block, HNB &amp; Central</b>	<b>Total 22/23 FY</b>
Balance Brought Forward from 21/22	(1.692)	27.665	25.973
Early Years Adjustment 21/22 prior year	(0.564)		(0.564)
Forecast variance 22/23	(2.386)	11.645	9.260
Estimated balance CFWD 2023-24	(4.642)	39.310	34.669

### **2023-24 Budget Planning**

With regard to the next financial year, we have not yet received 2023-24 allocations however, assuming we receive this during December as anticipated, we will look at options and seek to maximise the hourly rate whilst minimising risk to the EY block at our January meeting.

### **SF Rep**

Emma and I met for an induction session on Schools Forum which went really well the with exception of realising that Emma will be unable to attend SF as the EY rep until the next academic year when her studies have ceased – Emma currently has Uni on a Thursday. I would therefore like to ask Lyssy if she would mind wearing two hats for the December, January and June meetings?

Should you have any questions around funding, please do give them to Lucy-Anne to share with me, otherwise my apologies for not being able to attend and I look forward to seeing you all in January where we will be looking at future hourly rates.

Marie Taylor  
Head of Finance, Children & Education  
21<sup>st</sup> November 2022

## **DEDICATED SCHOOLS BUDGET – BUDGET MONITORING 2022-23**

### **Purpose of the Report**

1. To present budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2022-23 as at 31st October 2022.

### **Main Considerations**

2. Appendix 1 to this report outlines the budget monitoring summary as at 31st October 2022.
3. An overspend of £9.260 million is currently projected against the overall schools budget which is an increase of £2.223m – largely due to the finalised September specialist school placements for the new academic year but also, impact of both children not being in school and able to be assessed during the pandemic and the inevitable impact of lockdown on children has meant the number of plans issued has exceeded pre-pandemic rates. The detailed budget monitoring report is shown in Appendix 1.

### ***Early Years Budgets (Budget £31.047M, forecast variance (£2.386M))***

4. Although this is forecast, it is anticipated that the DfE's post financial year adjustment will adjust for this in whole or, part in the 2023-24 financial year if the January 2023 census numbers fall.

	<b>Budgeted PTE</b>	<b>Forecast PTE</b>	<b>Forecast PTE Variance</b>	<b>Budgeted Spend £M</b>	<b>Forecast Spend £M</b>	<b>Forecast spend Variance £M</b>
2-year-olds	828	759	(69)	2.686	2.461	(0.225)
3- & 4-year olds	10,738	9,779	(959)	27.055	24.865	(2.190)
ISF	2,826 (hours)	3,240 (hours)	414 (hours)	0.537	0.616	0.079

### **COMF Grant Funding**

5. Early Years officers have been successful with a 2022-23 bid to the Director of Public Health to facilitate containment of the virus as below.
  - a. Payment to open or partially open settings - funded and non-funded provision; a one-off grant to support purchase of PPE and increased cleaning costs. £0.370 million.
  - b. Deep cleaning and hardship fund – available for applications of support £0.100

**Schools Budgets (Budget £326.956M, forecast variance (£0.141M))**

6. The forecast underspend on schools largely relates to the school supply cover fund which currently shows a forecast underspend and is helping to offset the overall pressure on the DSG.

**High Needs Budgets (Budget £66.405M, forecast variance £11.820M)**

7. High Needs budgets are projected to overspend by £11.820m. The biggest areas of overspend are Independent Special School packages, alternative provision, named pupil allowances and top ups. 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.
8. Following the pandemic, when professionals could not assess children and young people in school, EHC assessments were delayed due to inevitable backlog. Whilst we have put in place temporary support funding to support learners, we continue to see increases in requests for assessment for plans, and our assumptions around future plans will need constant adjustment to be as accurate as possible.
9. 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. Please note the lower growth rate of EHCPS than in previous years in the table below.

	<b>Children with an EHCP in Wiltshire</b>	<b>Prior Year Data (2021-22)</b>
Number as at 1 <sup>st</sup> April 2022	4,371	(01/4/21) – 4,118
As at 31 <sup>st</sup> October 2022	4,650	(31/8/21) – 4,242
Forecast demand to 31 <sup>st</sup> March 2023 (based on historical trend)	5,073	(31/3/22) – 4,371
Annual movement	<b>423 (16.1% increase)</b>	<b>253 (6.1% increase)</b>

10. As Schools Forum are aware, much work has been done, over recent years to investigate and address the issues. More detail is reported regularly through the high needs working group update from the Director, Education and Skills and Head of Inclusion & SEN.

**Central School Services Block (Budget £2.344M, forecast variance (£0.034M))**

11. There is a small forecast underspend in this area driven by careful management of the specialist education packages for children in care.

**DSG Reserve**

12. The reserve brought forward of £25.973 million is increased by the positive early years block adjustment of £0.564 million. The forecast overspend would take the reserve into a deficit position of £32.446 million.
13. The local authority is working closely with the DfE Developing Better Value partners CIPFA and Newton to enhance our current plans, adding insight from other local authority action plans and offering the opportunity to bid for transformational funding.
14. At the next available meeting, the early years reference group will consider 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.



<b>DSG Reserve</b>	<b>Early Years Ringfence (effective 01-04-22)</b>	<b>Schools Block, HNB &amp; Central</b>	<b>Total 22/23 FY</b>
Balance Brought Forward from 21/22	(1.692)	27.665	25.973
Early Years Adjustment 21/22 prior year	(0.564)		(0.564)
Forecast variance 22/23	(2.386)	11.645	9.260
Estimated balance CFWD 2023-24	(4.642)	39.310	34.669

### **Proposals**

15. Schools Forum is asked to note the budget monitoring position at the end of October 2022 in conjunction with the high needs recovery plan and the “Developing Better Value” (DBV) update later in the agenda.

*Report Author: Marie Taylor,*

*Head of Finance, Children & Education*

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

72.764 5.82111682 23.049 0.921975

a	b	c	d = (c-b)	e = (d/b)	f	d = (c-b)	g
Service Area	Current Annual Budget £m	Period 7 Forecast £m	Period 7 Forecast Variance £m	%	21/22 Outturn Variance	September forecast variance £m	Budget Move-ment from Previous Report
Three to Four Year Olds EY Entitlement Funding	27.055	24.865	(2.190)	-8.09%	(2.004)	(2.190)	0.000
Two Year Olds EY Entitlement Funding	2.686	2.461	(0.225)	-8.38%	0.111	(0.225)	0.000
Early Years Inclusion Support Fund	0.537	0.616	0.079	14.63%	0.089	0.079	0.000
Early Years Pupil Premium & DAF	0.339	0.307	(0.032)	-9.46%	(0.049)	(0.032)	0.000
Early Years Central Expenditure	0.430	0.413	(0.017)	-4.05%	(0.032)	(0.011)	-0.007
<b>Early Years Block</b>	<b>31.047</b>	<b>28.661</b>	<b>-2.386</b>	<b>-7.68%</b>	<b>-1.885</b>	<b>-2.379</b>	<b>-0.007</b>
Schools Budget Shares Primary & Secondary - Local Authority Schools	112.179	112.179	0.000	0.00%	0.000	0.000	0.000
Schools Budget Shares Primary & Secondary - Academy Schools	211.575	211.575	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	0.040	(0.015)	-27.49%	0.002	(0.015)	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	0.547	(0.094)	-14.72%	(0.091)	(0.094)	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	0.541	(0.024)	-4.18%	(0.061)	(0.024)	0.000
<b>De Delegated Total</b>	<b>1.954</b>	<b>1.821</b>	<b>-0.133</b>	<b>-6.81%</b>	<b>-0.150</b>	<b>-0.133</b>	<b>0.000</b>
Growth Fund	1.029	1.021	(0.008)	-0.79%	(0.795)	0.000	-0.008
<b>Schools Block</b>	<b>326.966</b>	<b>326.825</b>	<b>-0.141</b>	<b>-0.04%</b>	<b>-0.795</b>	<b>-0.133</b>	<b>-0.008</b>
Special School Place Funding	8.337	8.337	0.000	0.00%	0.000	0.000	0.000
Resource Base (RB) Funding	1.975	1.975	0.000	0.00%	0.000	0.000	0.000
Enhanced Learning Provision (ELP) Funding	1.793	1.793	0.000	0.00%	0.000	0.000	0.000
<b>High Needs Block (all schools)</b>	<b>12.105</b>	<b>12.105</b>	<b>0.000</b>	<b>0.00%</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
Named Pupil Allowances (NPA)	6.733	8.099	1.366	20.29%	1.093	0.374	0.992
Special School Top-Up	8.626	10.141	1.515	17.56%	1.664	1.733	-0.219
Resourced Base (RB) Top-Up	1.982	3.011	1.029	51.91%	0.206	0.972	0.057
Enhanced Learning Provision (ELP) Top-Up	2.420	2.497	0.077	3.17%	1.163	0.070	0.007
Estimate of Transitional Support (TSP) payments	1.000	1.218	0.218	21.78%	0.459	0.223	-0.005
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
<b>Devolved to Maintained &amp; Top Up Total</b>	<b>23.636</b>	<b>27.840</b>	<b>4.204</b>	<b>17.79%</b>	<b>4.555</b>	<b>3.372</b>	<b>0.832</b>
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	3.333	0.940	39.26%	0.775	0.940	0.000
Post-16 Top-Up	6.157	6.546	0.389	6.32%	3.050	0.379	0.010
Independent & Non-Maintained Special Schools	11.637	15.406	3.768	32.38%	1.627	2.992	0.777
SEN Alternative Provision, Direct Payments & Elective Home Education	2.370	4.932	2.561	108.06%	0.308	2.561	0.000
Education Other than at School (EOTAS)	0.491	0.484	(0.007)	-1.38%	(0.066)	(0.007)	-0.000
<b>Funding for Places outside Schools</b>	<b>25.167</b>	<b>32.819</b>	<b>7.652</b>	<b>30.40%</b>	<b>5.695</b>	<b>6.865</b>	<b>0.787</b>
High Needs in Early Years Provision	0.454	0.454	0.000	0.00%	(0.032)	0.000	0.000
Speech & Language	0.564	0.551	(0.014)	-2.42%	(0.015)	(0.014)	0.000
SEND Business Support	0.115	0.119	0.004	3.57%	0.000	0.000	0.004
0-25 Inclusion & SEND Teams	2.564	2.554	(0.010)	-0.38%	(0.206)	0.055	-0.065
Specialist Teacher Advisory Service	1.390	1.375	(0.016)	-1.13%	(0.132)	(0.006)	-0.010
Other Special Education	0.409	0.409	0.000	0.00%	(0.149)	0.000	0.000
<b>Commissioned &amp; SEN Support Services</b>	<b>5.497</b>	<b>5.462</b>	<b>-0.035</b>	<b>-0.64%</b>	<b>-0.533</b>	<b>0.035</b>	<b>-0.070</b>
<b>High Needs Block</b>	<b>66.405</b>	<b>78.226</b>	<b>11.820</b>	<b>17.80%</b>	<b>9.717</b>	<b>10.272</b>	<b>1.548</b>
Central Licences	0.409	0.409	(0.000)	0.00%	0.000	(0.000)	0.000
Central Provision (Former ESG)	1.191	1.203	0.012	1.00%	0.266	0.074	-0.062
Admissions	0.447	0.454	0.007	1.63%	(0.015)	0.008	-0.001
Servicing of Schools Forums	0.003	0.003	0.000	0.00%	0.000	0.000	0.000
<b>Central Provision within Schools Budget</b>	<b>2.050</b>	<b>2.069</b>	<b>0.019</b>	<b>0.93%</b>	<b>0.251</b>	<b>0.082</b>	<b>-0.063</b>
Education Services to CLA	0.103	0.050	(0.053)	-51.46%	(0.081)	(0.053)	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
<b>Historic Commitments</b>	<b>0.294</b>	<b>0.241</b>	<b>-0.053</b>	<b>-18.03%</b>	<b>-0.081</b>	<b>-0.053</b>	<b>0.000</b>
<b>Central School Services</b>	<b>2.344</b>	<b>2.310</b>	<b>-0.034</b>	<b>-1.44%</b>	<b>0.170</b>	<b>0.029</b>	<b>-0.063</b>
<b>Total Schools Budget</b>	<b>426.762</b>	<b>436.022</b>	<b>9.260</b>	<b>2.17%</b>	<b>7.056</b>	<b>7.789</b>	<b>1.470</b>
Pupil Premium (academy & maintained)	15.284	15.284	0.000	0	0	0	Academy & Maintained school (excl CiC)
6th Form Funding Maintained Schools (LSC Grant)	1.118	1.118	0.000	0	0	0	Maintained schools only
UI Free School Meal Grant Provisional (academy & maintained)	5.543	5.543	0.000	0	0	0	Figure provided by DW
PE & Sports Revenue Grant (academy & maintained)	1.508	1.508	0.000	0	0	0	Figure provided by DW
<b>DfE Revenue Grants for all Wiltshire Schools</b>	<b>23.452</b>	<b>23.452</b>	<b>0.000</b>	<b>0</b>			
<b>TOTAL DfE SCHOOLS FUNDING</b>	<b>450.214</b>	<b>459.474</b>	<b>9.260</b>	<b>2.06%</b>			

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

Appendix 2 - the service forecasts of planned activity in FTE (full time equivalent pupils) as at 30th April 2022- this is a measure of volumes of pupil placements / support arrangements

	0.000						
<b>Early Years Block</b>	31.047	28.661	-2.386	-0.077	-1.885	-2.379	-0.007
<b>Schools Block</b>	326.966	326.825	-0.141	-0.000	-0.795	-0.133	-0.008
<b>High Needs Block</b>	66.405	78.226	11.820	0.178	9.717	10.272	1.548
<b>Central School Services</b>	2.344	2.310	-0.034	-0.014	0.170	0.029	-0.063
<b>Total Schools Budget</b>	<b>426.762</b>	<b>436.022</b>	<b>9.260</b>	<b>0.022</b>	<b>7.056</b>	<b>7.789</b>	<b>1.470</b>

Reconciliation to DfE Allocations for 20/21

Rec	DfE Alloc	Transfers	Adj DSG	Above	Difference	
EY	(30.867)		(30.867)	31.047	0.180	
SB	(328.594)	1.628	(326.966)	326.966	0.000	
HNI	(64.697)	(1.888)	(66.585)	66.405	(0.180)	
CS	(2.604)	0.260	(2.344)	2.344	0.000	Overheads
	<b>(426.762)</b>	<b>0.000</b>	<b>(426.762)</b>	<b>426.762</b>	<b>0.000</b>	

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 7 Forecasted Activity FTE	Period 7 Forecasted Variance FTE	Period 7 Forecasted Variance %	21/22 Outturn Volume	Volume movement from Previous Report	Forecast Average Prices	21/22 Actual Average Prices	Unit	Movement from Previous Report
Three/Four Year Olds	10,738	9,779	(959)	-9%	9,721	-	£4.42	£4.25	p/hr	
Two Year Olds	828	759	(69)	-8%	828	-	£5.69	£5.48	p/hr	
ISF	2,826	3,240	414	0%	0	-	£190	£615	per child	
							£0.53	£0.53	pa	
<b>Early Years Block ACTIVITY DRIVER DATASET</b>	<b>14,392</b>	<b>13,778</b>	<b>(614)</b>	<b>-4%</b>	<b>10,549</b>	<b>-</b>				
Sp Sch Place Funding	862	862	0	0%	806	-	£9,671	£10,000	pa	
RB Funding	335	335	0	0%	329	-	£5,897	£6,000	pa	
ELP Funding	301	301	0	0%	315	- 0	£5,965	£6,000	pa	
	<b>1,498</b>	<b>1,498</b>	<b>0</b>	<b>0%</b>	<b>1,449</b>	<b>- 0</b>			pa	
NPA	1,537	1,644	107	7%	1,215	79	£4,926	£6,235	pa	
Special School Top-Up	799	929	130	16%	872	2	£10,913	£11,370	pa	
RB Top-Up	330	438	108	33%	383	26	£6,872	£5,800	pa	
ELP Top-Up	513	507	(6)	-1%	444	1	£4,928	£6,374	pa	
TSP		106	106	0%	95	0	£11,486	£4,325	pa	
	<b>3,179</b>	<b>3,624</b>	<b>445</b>	<b>14%</b>	<b>3,009</b>	<b>104</b>	<b>£7,682</b>	<b>£8,539</b>	pa	
Wiltshire College Places	353	353	0	0%	350	-	£6,000	£6,000	pa	
Non Wiltshire Schools	178	234	56	32%	216	0	£14,243	£13,196	pa	
Post-16 Top-Up	568	694	126	22%	544	1	£9,433	£10,629	pa	
Ind & Non-Maint Sp Sch	219	282	63	29%	259	11	£54,585	£52,022	pa	
SEN AP, DP & EHE	172	393	221	128%	197	2	£12,561	£13,185	pa	
	<b>1,490</b>	<b>1,956</b>	<b>466</b>	<b>31%</b>	<b>1,566</b>	<b>14</b>	<b>£16,780</b>	<b>£17,415</b>	pa	
<b>High Needs Block ACTIVITY DRIVER DATASET</b>	<b>6,167</b>	<b>7,078</b>	<b>911</b>	<b>15%</b>	<b>6,024</b>	<b>118</b>	<b>£11,053</b>	<b>£11,522</b>		

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 DfE are costed to top ups

# Agenda Item 8

## **SEND Update**

Cate Mullen (Head of SEND and Inclusion) will present a SEND update at the meeting.

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## Dedicated Schools Grant Consultations 2023-24

### Purpose of the Report

1. To update Schools Forum with the results of the recent Autumn consultations relating to;
  - De-delegation of central services - Maintained Schools only
  - Transfer of funds from Schools Block to High Needs Block – all schools
2. The survey results will help to inform Schools Forum decisions for setting the budgets for the 2023-24 financial year.

### De-Delegation of Central Services Consultation Responses

3. Under the “soft formula”, funding should be fully delegated to schools, however certain central services can be ‘de-delegated’ for maintained schools only, with approval of the respective maintained Schools Forum representatives.
4. The funding regulations require that all maintained schools are consulted and given the opportunity to express their preferences for the services which can be de-delegated. The services consulted as part of the 2023-24 consultation process were:
  - Free School Meal Eligibility Checks
  - Access Budget Planning Software Licence (formerly known as HCSS)
  - Trade Union Facilities Costs
  - Maternity Costs
  - Ethnic Minority Achievement Service
  - Traveller Education Service
  - Behaviour Support Service
5. The consultation took place through Right Choice with during the Autumn term to enable schools to consider their responses. The consultations closed on the 18<sup>th</sup> of November 2022. Schools Forum members can see the questions and results of the consultation, detailed in Appendix 1.
6. A total of 21 responses were received, 18 responses from Primary Schools and 3 from Secondary Schools. This compares slightly less favourably than the consultation for the 2022-23 year where 25 responses were received. It is widely known that schools rely on their Schools Forum colleagues to make the appropriate decision on their behalf.
7. The results received were significantly in favour of retaining the de-delegated services in both the Primary and Secondary schools which will inform eligible Schools Forum representatives when voting on the school budgets for 2023-24.

## Transfer of Schools Block to Support the High Needs Block

8. Schools have been consulted during recent years regarding a potential transfer of funds between the Schools Block and the High Needs Block of the DSG. Whilst it has been a generally unwelcome question to ask schools, members of Schools Forum have acted with integrity and in the greater interests of schools and supported a transfer of funds to help with the increasing demand and costs of SEN, within the county.
9. The funding regulations do allow for a transfer of funding between the Schools Block and other blocks within the DSG. In the last four financial years, Schools Forum agreed to the following transfers.
  - 2019-20 - £2.2m which equated to 0.8% of Schools Block funding
  - 2020-21 - £2.065m which equated to 0.7% of Schools Block, which was subsequently reduced to 0.5% by the Secretary of State.
  - 2021-22 - £1.517m which equated to 0.5% of Schools Block funding
  - 2022-23 - £1.628m which equated to 0.5% of Schools Block funding
10. Local Authorities have the flexibility to move up to 0.5% of the Schools Block of funding, with the agreement of its Schools Forum. Anything higher would require approval from the Secretary of State through a disapplication request. It was agreed at previous Schools Forum meetings that a request to transfer greater than 0.5% would not be applied for, due to previous decisions of the Secretary of State, unless the results of the consultation supported a greater transfer.
11. In order for Schools Forum to make a decision about a potential transfer, the autumn consultation was issued through the Right Choice as a survey with a closing date of the 18<sup>th</sup> November 2022 enabling schools to consider their responses.
12. Schools Forum members can see the questions and results of the consultation, detailed in Appendix 2.
13. This consultation was open to all schools, both maintained and academy schools and a total of 21 responses were received, slightly up from the 19 responses received last year and can be broken down as follows.
  - 7 secondary schools
  - 14 primary schools
14. Of the schools that responded, the results can be summarised as below;
  - All 21 respondents supported a transfer of funds from the Schools Block to the High Needs Block.
  - Only 1 respondent supported a reduction in Top-Up values.
  - Only 3 respondents supported a 'Hybrid' option of a block transfer and a reduction in Top-Up values.
  - The breakdown of transfer values has been detailed, as below.

<b>Value</b>	<b>Schools</b>	<b>% Support</b>
£0.5m (0.15%)	1	4.8%
£1.0m (0.29%)	3	14.2%
£1.71m (0.5%)	17	81.0%
£2.0m (0.58%)	0	0.0%



15. This data will inform the decision making around the 2023-24 budget for both De-delegation in maintained schools and a transfer of funding from the Schools Block to the High Needs Block.

### **Proposals**

16. Schools Forum is asked to note the local consultation responses in relation to the schools delegated budget for 2023-24 financial year.

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

- **De-delegation** of central services for Maintained schools
  - FSM – primary and secondary
  - Licences – primary and secondary
  - Trade Union – primary and secondary
  - Maternity – primary and secondary
  - Ethnic Minority Support – primary only
  - Traveller Education – primary only
  - Behaviour Support – primary only
  
- **Block transfer** between Schools Block and the High Needs Block, subject to affordability when school funding for 2023-24 has been confirmed.
  - Transfer of 0.5% of Schools Block to the High Needs Block, the maximum allowable without Secretary of State approval which equates to approximately £1.71m.

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## Appendix 1 – De-Delegation Consultation

### Questions

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

### Results

A summary of the results is set out below.

PRIMARY	FSM	Licences	Trade Union	Maternity	EMAS	Traveller Education	Behaviour Support
Delegate	1	1	0	0	4	3	2
De-delegate	17	17	17	17	14	15	16
<b>Total</b>	<b>18</b>	<b>18</b>	<b>18</b>	<b>18</b>	<b>18</b>	<b>18</b>	<b>18</b>

SECONDARY	FSM	Licences	Trade Union	Maternity	EMAS	Traveller Education	Behaviour Support
Delegate	0	0	0	0	N/a	N/a	N/a
De-delegate	3	3	3	3	N/a	N/a	N/a
<b>Total</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>N/a</b>	<b>N/a</b>	<b>N/a</b>

## Appendix 1 – De-Delegation Consultation

### Dedelegated Responses 2023-24

SCHOOL	RESPONSE						
	FSM	HCSS	Trade Union	Maternity	EMAS	Traveller	Behaviour Supp
P1	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P2	Retain	Retain	Retain	Retain	Delegate	Retain	Retain
P3	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P4	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P5	Retain	Retain	Retain	Retain	Delegate	Delegate	Retain
P6	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P7	Delegate	Delegate	Retain	Retain	Delegate	Delegate	Delegate
P8	Retain	Retain	Retain	Retain	Delegate	Delegate	Delegate
P9	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P10	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P11	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P12	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P13	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P14	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P15	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P16	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P17	Retain	Retain	Retain	Retain	Retain	Retain	Retain
P18	Retain	Retain	Retain	Retain	Retain	Retain	Retain
S1	Retain	Retain	Retain	Retain	Retain	Retain	Retain
S2	Retain	Retain	Retain	Retain	Retain	Retain	N/A
S3	Retain	Retain	Retain	Retain	Delegate	Delegate	Delegate

## Appendix 2 – Block Transfer Consultation

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

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

Yes	
No	

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

Value to Transfer	£/Pupil	Please select
£0.0m (0.0%)	£0.00 / pupil	
£0.5m (0.15%)	£7.76 / pupil	
£1.0m (0.29%)	£15.53 / pupil	
£1.71m (0.5%)	£26.63 / pupil	
£2.0m (0.58%)	£31.06 / pupil	

Qu 2c - No transfer of funding from the Schools Block to the High Needs Block for 2023-24. The impact of this would be that Top-Ups and Named Pupil Allowance (NPA) funding levels would have to be reduced to help with cost pressures in the High Needs Block. Do you support a reduction in these rates?

Yes	
No	

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

Yes	
No	

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

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## Appendix 2 – Block Transfer Consultation

### Consultation Responses

#### High Needs Consultation Responses 2023-24

SCHOOL	Transfer To High Needs		Reduction In Top Ups		Hybrid Option	
	YES	NO	YES	NO	YES	No
P1	✓			✓		✓
P2	✓			✓		✓
P3	✓			✓		✓
P4	✓			✓		✓
P5	✓			✓		✓
P6	✓			✓		✓
P7	✓					
P8	✓			✓		✓
P9	✓			✓		✓
P10	✓			✓		✓
P11	✓			✓	✓	
P12	✓			✓		✓
P13	✓			✓	✓	
P14	✓		✓		✓	
S1	✓			✓		✓
S2	✓			✓		✓
S3	✓			✓		✓
S4	✓			✓		✓
S5	✓			✓		✓
S6	✓			✓		✓
S7	✓			✓		✓

#### Value to Transfer

SCHOOL	Value to Transfer				
	0	0.15%	0.29%	0.50%	0.58%
P1				✓	
P2				✓	
P3				✓	
P4				✓	
P5				✓	
P6				✓	
P7				✓	
P8			✓		
P9			✓		
P10				✓	
P11				✓	
P12				✓	
P13				✓	
P14			✓		
S1				✓	
S2				✓	
S3		✓			
S4				✓	
S5				✓	
S6				✓	
S7				✓	

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## Local Consultation – School Improvement Services 2023-24

### Purpose of the Report

1. To update Schools Forum with the results of the recent consultation with maintained schools relating to;
  - removal of the ‘*School improvement, monitoring and brokering grant*’ - 2023-24
2. The survey results will help to inform Schools Forum decisions for setting the budgets for the 2023-24 financial year.

### Background to Consultation

3. The Department for Education (DfE) released its consultation ‘*Reforming how local authorities’ school improvement functions are funded*’ in late October 2021.
4. The two key questions which formed the mainstay of the DfE consultation were to:
  - a. **Remove** the Local Authority Monitoring & Brokering Grant (LAMB), which is currently allocated to local authorities to support school improvement activities; and
  - b. **Make provisions** within the School and Early Years Finance (England) Regulations for the financial year (FY) 2022-23 to allow local authorities to fund all of their school improvement activity (including all core school improvement activities) via de-delegation from schools’ budget shares.
5. The LAMB has been provided to local authorities since 2017, to help fulfil their core improvement activities, which was based upon the number of maintained schools.
6. The proposals from the DfE were to reduce the grant by 50% in 2022-23, with full removal in the 2023-24 year. Local authorities have had the opportunity to fund improvement services through either de-delegation or on a traded basis.
7. For the 2022-23 year, maintained schools members of Schools Forum agreed to fund the loss of 50% of the LAMB grant through de-delegation and would consult colleagues once again before any decision would be taken for the 2023-24 year.

### The Local Consultation

8. In order to provide Schools Forum with a steer for the 2023-24 year, a local consultation was arranged to provide maintained schools with the opportunity to express their preference regarding a contribution to support the loss of LAMB funding. A copy of the consultation is held at Appendix 1.
9. The consultation was open to all maintained schools and a total of 39 responses were received (up from 28 for 2022-23), which can be broken down as follows.
  - 4 secondary schools
  - 34 primary schools
  - 1 special school
10. Of the schools that responded, the results can be summarised as detailed in the tables below;

<b>All Schools</b>	<b>Impact</b>	<b>1st Choice</b>	<b>2nd Choice</b>	<b>3rd Choice</b>	<b>4th Choice</b>	<b>5th Choice</b>
Schools don't fund any loss of LAMB	Reduction in Services - £459k	5	7	1	1	23
Schools fund 50% loss of LAMB	Reduction in Services - £229.5k	11	8	2	18	0
Schools fund 75% of LAMB	Reduction in Services - £114,8k	3	5	30	0	0
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k	4	16	5	13	0
Schools fund 100% of LAMB	Existing service maintained	16	2	0	6	14

<b>Primary</b>	<b>Impact</b>	<b>1st Choice</b>	<b>2nd Choice</b>	<b>3rd Choice</b>	<b>4th Choice</b>	<b>5th Choice</b>
Schools don't fund any loss of LAMB	Reduction in Services - £459k	4	5	1	0	22
Schools fund 50% loss of LAMB	Reduction in Services - £229.5k	9	7	1	17	0
Schools fund 75% of LAMB	Reduction in Services - £114,8k	3	4	26	0	0
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k	3	15	5	10	0
Schools fund 100% of LAMB	Existing service maintained	15	2	0	6	10

<b>Secondary &amp; Special</b>	<b>Impact</b>	<b>1st Choice</b>	<b>2nd Choice</b>	<b>3rd Choice</b>	<b>4th Choice</b>	<b>5th Choice</b>
Schools don't fund any loss of LAMB	Reduction in Services - £459k	1	2	0	1	1
Schools fund 50% loss of LAMB	Reduction in Services - £229.5k	2	1	1	1	0
Schools fund 75% of LAMB	Reduction in Services - £114,8k	0	1	4	0	0
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k	1	1	0	3	0
Schools fund 100% of LAMB	Existing service maintained	1	0	0	0	4



11. This data will inform the decision making around the 2023-24 budget for school improvement services. The Department for Education have confirmed that any commitment for funding to fund School Improvement services will come under the de-delegation methodology.

### **Proposals**

12. Schools Forum is asked to note the local consultation responses in relation to the school improvement services for the 2023-24 financial year.
13. Schools Forum is asked to consider the making of an 'in principle' decisions in accordance with the consultation responses and discussions with colleagues in maintained schools.

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## Appendix 1 – Future Funding of School Improvement - Consultation

Please rank the options below in order of priority, where 1 is your preferred option and 5 is your least favoured option?

### **What are you being asked to do?**

In order to plan for the proposed full removal of the grant, we need to consult with you to collect your views on the level of service you would require from the School Effectiveness Team moving forward.

Based upon the options in the above table which sets out the cost per pupil, schools are asked to consider which of the options, would be their preference. The decision should take account of the financial impact for the school alongside the loss of Support from the School Effectiveness Team.

***Your views are vitally important to help inform the maintained representatives of Schools Forum, who will be required to make decisions on behalf of all maintained schools.***

Please rank your preferred options below in order of preference, where 1 is your preferred option and 5 is your least favoured option? ***(Schools are currently funding at the 50% of LAMB)***

<b><u>Options</u></b>	<b><u>Impact in School Effectiveness</u></b>	<b><u>Cost to Schools</u></b>	<b><u>Amount per pupil</u></b>	<b><u>Rank</u></b>
Schools don't fund any loss of LAMB	Reduction in Services - £459k	£0	£0	
Schools fund 50% loss of LAMB	Reduction in Services - £229.5k	£229,500	£9.57	
Schools fund 75% of LAMB	Reduction in Services - £114,8k	£344,250	£14.35	
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k	£401,625	£16.75	
Schools fund 100% of LAMB	Existing service maintained	£459,000	£19.14	

Wiltshire Council

Schools Forum

8<sup>th</sup> December 2022

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## Allocation of Funding for Pupil Growth 2023-24

### Purpose of the Report

1. To seek agreement on the methodology for allocating funding for pupil growth from the school's block growth fund in 2023-24.

### Background

2. Wiltshire currently operates a growth fund and Schools Forum agreed to a number of criteria for the allocation of funding for pupil growth in previous years. The current growth fund criteria has previously been confirmed as being fully compliant by the Education and Skills Funding Agency (ESFA).
3. There was a change in the methodology for funding local authorities for growth three years ago, however this has not changed the way in which growth funding is allocated locally to schools.

### Funding Methodology

4. Growth allocations for 2023-24 will be based on pupil data from the October 2022 census and the October 2021 census.
5. Funding is allocated to local authorities based on the actual growth in pupil numbers they experienced over the previous year. This ensures that over time local authorities are funded on the basis of the actual growth they experience (on a lagged basis), rather than being based upon historic spending decisions.
6. The DfE measure growth within local authorities at **middle layer super output area** (MSOA)1 level. MSOAs are used as these are small enough geographical areas to detect 'pockets' of growth within local authority areas. Growth is measured by counting the increase in pupil numbers in each MSOA in the local authority between the October 2021 and October 2022 censuses. Only positive increases in pupil numbers will be included, so positive growth in one area, and negative growth in another, will not be denied growth funding.
7. In Wiltshire, growth is measured by separating the county into 62 MSOA's with an average of 4 schools in each MSOA area.

8. For each local authority, the growth factor allocates:
- **£1,520** for each primary 'growth' pupil (was £1,485, £1,455, £1,425, and £1,370 previously)
  - **£2,275** for each secondary 'growth' pupil, (was £2,220, £2,175, £2,130, and £2,050 previously) and
  - **£74,700** for each brand-new school that opened in the previous year. (was £70,800, £68,700, £67,000, and £65,000 previously)
9. The DfE do not expect local authorities to use these rates in their local arrangements for funding growth. The growth factor in the national funding formula is a proxy for overall growth costs at local authority level, and not at the level of individual schools. Local authorities generally allocate growth funding using a local arrangement as there is no national method adopted for allocating growth funding. Therefore, Schools Forum should therefore continue to make decisions about growth funding locally as they do now.

The DfE consultation during the Summer of 2022, proposed options around the future for Growth funding and whilst no decision has been taken, it was recognised that awarding growth funding at a local level would be appropriate, with LA's being able to apply local knowledge and intelligence.

(The Wiltshire allocation for 2023-24 will be announced in December as part of the schools funding announcement.)

## **Main Considerations**

10. The growth funding forms part of the local authority's Schools Block of funding. For 2023-24, growth funding will be allocated using the formulaic approach, based upon lagged growth data. With regard to allocating funding from the growth fund, the requirements are that:
- a) can be used only for the purposes of supporting growth in pre-16 pupil numbers to meet basic need
  - b) to support additional classes needed to meet the infant class size regulations
  - c) to meet the costs of new schools
  - d) the fund must be used consistently for the benefit of both maintained schools and academies
  - e) any funds remaining at the end of the financial year will form part of the overall DSG surplus or deficit balance.

- f) local authorities will be required to produce criteria on which any growth funding is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of all growth funding. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid
- g) local authorities will need to propose the criteria and size for the growth fund to Schools Forum and gain its agreement on both the criteria and size of the fund, before growth funding is allocated.

### **Proposed Criteria**

11. The proposed criteria for funding pupil growth within the local Wiltshire funding formula in 2023-24 are as follows:

#### **New School Allowance (unchanged from 2013-14):**

- 12. Schools receive funding in advance of pupils arriving in the school, based on the result of the pupil teacher ratio rounded up to the nearest next whole number. The PTRs used are 26.5:1 for KS1 & 27.5:1 for KS2.
- 13. The topped-up element to the next whole number is arrived at by multiplying the result by the salary of a teacher on the top point of the teacher's main scale 6 + on-costs. This element will apply until the first year group has left the school or until the school is full (whichever occurs first).
- 14. In addition, the costs of a head teacher and 10 hours admin support will be available one "old" term before opening. 55% of the Lump Sum will be available two "old" terms before opening. In the first year of opening the school will also receive funding towards supplies and services comprising, 34% of the Lump Sum, 17% in the second year & 8.5% in the third year after opening. (The Lump Sum is proposed at £128,000, the NFF rate for 2023-24).
- 15. New schools may also receive an estimate of the new pupil intake for the forthcoming academic year. This approach will be in place for the number of years equal to the number of year groups at the school. The initial estimate may be changed at a later date (but no later than the end of Term 6) to more accurately reflect the likely new intake, with the agreement of the school.

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

- 16. Where a school is expanded to provide additional classes to meet 'basic need' for places identified by the LA, from the month of opening the additional class for the remainder of the financial year only, the school will receive the relevant 12ths x 30 x relevant AWPU for each additional class. Where a full class may not be needed then the school would receive the relevant 12ths x estimate of increased September intake x relevant AWPU. The definition of

“expanded” is that a building project or addition of a mobile classroom has taken place.

### **Infant Class Size Increases:**

17. This is payable to a Primary School with infant classes which is required to set up an additional class in the Autumn term as required by the infant class size regulations, and the school cannot accommodate all of its additional Reception and Key Stage 1 pupils in classes of 30 or less, i.e. the total number of pupils in the 3 year groups exceeds a multiple of 30. Where the total increase in NOR between the two October census dates is greater than 13 and necessitates that an extra class would be required, then additional funding is allocated per additional class.
18. Schools Forum is required to consider and approve the above criteria for application in 2023-24.

### **Falling Rolls Fund**

19. LA's may set aside Schools Block funding to create a small fund to support good schools with falling rolls, where local planning data shows that surplus places will be needed within the next three financial years.
20. Any fund established for the purposes of a Falling Rolls fund would represent a top-slice of the Schools Block. Criteria would need to be established to support the fund, including clear trigger points for qualification. Compliant criteria could include;
  - Support only available to Good or Outstanding schools
  - Surplus capacity exceeds a certain proportion of PAN
  - Local planning data shows that the places will be filled within the next three years
  - The school will be required to make redundancies in order to contain spending within its formula budget
21. Any formula for funding schools could include;
  - A rate per vacant place and maximum number of places
  - A lump sum payment to schools
22. Wiltshire Schools Forum has always resisted the establishing of a Falling Rolls Fund and is being asked to consider establishing such a fund, in light of its previous decisions on this topic and the additional pressures being placed upon the Schools Block.
23. There has been no pressure from schools or other groups for the establishing of a Falling Rolls Fund, due to the limitations around the criteria.

24. The DfE consultation in the Summer of 2022, did propose amendments to the rules surrounding a Falling Rolls Fund. The results of the consultation have not yet been published.

## **25. Proposal**

It is proposed that:

- a) Schools Forum approve the criteria for allocating pupil Growth Fund in 2023-24.
- b) Schools Forum agree that the budget for the Growth Fund to be set at its meeting in January 2023, when the full DSG has been confirmed for the 2023-24 year.
- c) Schools Forum give consideration to the establishing of a Falling Rolls Fund and any criteria befitting such a fund.

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**Wiltshire Council**

**Schools Forum**

**8<sup>th</sup> December 2022**

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## **National Funding Formulae for Schools and High Needs – 2023-24**

### **Purpose of report**

1. To seek 'in principle' decisions from members of Schools Forum with regards to the Wiltshire funding formula for the 2023-24 year.
2. At the October 2022 Schools Forum meeting, the key funding arrangements as published by the DfE in its document '*The national funding formulae for schools and high needs – 2023-24*', were presented.
3. Prior to the funding settlement being announced in December, a number of 'in principle' decisions are sought to help with the school budget preparations. Separate papers have been prepared relating to the De-delegation consultation, funding for the removal of the LAMB and the transfer of funding to support the High Needs Block.

### **Background**

4. The 2023-24 year represents another year where the Government has pledged to boost schools funding, with an increase of £2.3bn into the overall Schools Block compared to the 2022-23 year.
5. The DfE will allocate school funding on the basis of the National Funding Formula (NFF) to local authorities. The funding is then run through the local funding formula, taking account of Schools Forum decisions to create individual school budgets. The Schools Block of the Dedicated Schools Grant (DSG) has been awarded an increase of 2.4% for the core funding factors and 4.3% for Deprivation factors compared to the 2022-23 year.
6. The 2023-24 year will be another 'soft' year with local Schools' Forum still retaining its role in determining the school funding allocation methodology. The DfE have confirmed their intention to move to a 'hard' national funding formula and are proposing a move to the full hard formula by 2027-28. In the meantime, there will be a tightening towards the full NFF.

### **Proposals for 2023-24**

7. The DfE have announced the indicative DSG Block allocations, based upon October 2021 census data which will be refreshed when the December funding allocations are announced.
8. The table below sets out the indicative DSG funding for the Schools, High Needs and Central Blocks. (The Early Years Block figures are simply replicated from the 2022-23 allocation to provide a view of the overall quantum of funding for 2023-24.)

	<b>Schools*</b>	<b>High Needs</b>	<b>Central</b>	<b>Early Years</b>	<b>TOTAL</b>
2022-23	£336,281,937	£64,768,256	£2,604,175	£30,866,919	<b>£434,521,287</b>
2023-24	£343,027,141	£67,825,547	£2,596,327	£30,866,919	<b>£444,315,934</b>
Headline Uplift	£6,745,204	£3,057,291	-£7,848	£0	<b>£9,794,647</b>
% Uplift	2.01%	4.72%	-0.3%	0.00%	<b>2.25%</b>

\* - Net of Growth funding – was £1.912m in 2022-23

9. The main formula for the 2023-24 year is broadly similar to the formula for the 2022-23 year however there are some changes, as detailed below.
  - a. Overall, funding through the NFF will increase by 1.9%
  - b. Core pupil-led funding factors and the lump sum to increase by 2.4%
  - c. Disadvantaged funding, FSM6 and IDACI factors to increase by 4.3%
  - d. The 'Minimum per pupil funding level' to increase by 3.3% to;
    - i. £4,405 for Primary
    - ii. £5,715 for Secondary
  - e. The School Supplementary Grant from 2022-23 has been rolled into the baseline funding and then inflated by the relevant percentage increases.
  - f. The Free School Meals factor (for the costs of providing a meal for eligible pupils) to increase by 2%
  - g. Every school to receive at least 0.5% more funding per pupil
  - h. A transfer of up to 0.5% of Schools Block funding to the High Needs Block will be permitted, subject to Schools Forum approval
  - i. All NFF factors must be used in the formula
  - j. The funding for EAL must be the EAL3 factor, meaning pupils will attract funding for the first three years they are within the state school system.

### **Role of Schools Forum and the Local Authority**

10. The government has confirmed its intention to move to a single direct NFF to determine every schools budget. For the 2023-24 year, the DfE have confirmed it will be another 'soft' year, with each LA along with its Schools Forum being able to determine its school funding formula.
11. In its consultation 'Implementing the Direct National Funding Formula' issued in July 2022, the DfE are expecting to move to the Direct (Hard) NFF by the 2027-28 funding year, at the latest.
12. All NFF factors will be mandatory from 2023-24 and the formula will be presented to Schools Forum when the final allocations have been confirmed in December and then to the LA for political ratification and approval in February 2023.

## Funding Values Proposed in the NFF for 2023-24

13. The table below sets out the NFF funding values for school for the 2023-24 year.

Factor	2019-20	2020-21	2021-22	2022-23	2023-24
Primary KS1&2 AWPU	£2,747	£2,857	£3,123*	£3,217*	£3,394**
Secondary KS3 AWPU	£3,863	£4,018	£4,404*	£4,536*	£4,785**
Secondary KS4 AWPU	£4,386	£4,561	£4,963*	£5,112*	£5,393**
Primary & Secondary FSM	£440	£450	£460	£470	£480
Primary FSM6	£540	£560	£575	£590	£705**
Secondary FSM6	£785	£815	£840	£865	£1,030**
IDACI Primary Band A	£575	£600	£620	£640	£670
IDACI Primary Band B	£420	£435	£475	£490	£510
IDACI Primary Band C	£390	£405	£445	£460	£480
IDACI Primary Band D	£360	£375	£410	£420	£440
IDACI Primary Band E	£240	£250	£260	£270	£280
IDACI Primary Band F	£200	£210	£215	£220	£230
IDACI Secondary Band A	£810	£840	£865	£890	£930
IDACI Secondary Band B	£600	£625	£680	£700	£730
IDACI Secondary Band C	£560	£580	£630	£650	£680
IDACI Secondary Band D	£515	£535	£580	£595	£620
IDACI Secondary Band E	£390	£405	£415	£425	£445
IDACI Secondary Band F	£290	£300	£310	£320	£335
Prior Attainment – Primary	£1,022	£1,065	£1,095	£1,130	£1,155
Prior Attainment – Secondary	£1,550	£1,610	£1,660	£1,710	£1,750
EAL – Primary	£515	£535	£550	£565	£580
EAL - Secondary	£1,385	£1,440	£1,485	£1,530	£1,565
Mobility – Primary	£0	£875	£900	£925	£945
Mobility – Secondary	£0	£1,250	£1,290	£1,330	£1,360
Lump Sum	£110,000	£114,400	£117,800	£121,300	£128,000**
Sparsity – Primary	£0-£25,000	£0-£26,000	£0-£45,000	£0-£55,000	£0-£56,300
Sparsity – Secondary	£0-£65,000	£0-£67,500	£0-£70,000	£0-£80,000	£0-£81,900
Primary - MPPFL	£3,500	£3,750	£4,180	£4,265	£4,405
Secondary – MPPFL	£4,800	£5,000	£5,415	£5,525	£5,715

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

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

## Key Funding Decisions to be taken by Schools Forum for the 2023-24 year

14. A number of funding decisions need to be taken by Schools Forum for the 2023-24 year including;
- To apply all the NFF factors in full
  - To set the Minimum Funding Guarantee at +0.5% (in line with NFF)
  - To transfer 0.5% of the Schools Block to High Needs Block (separate paper)

## Budget Setting Process 2023-24

15. The timeline for setting the 2023-24 budget is expected to follow.

December 8 <sup>th</sup>	Schools Forum agree in principle decisions for funding, de-delegation and block transfers
December 16 <sup>th</sup>	DfE issue funding allocations
January 19 <sup>th</sup>	Schools Forum confirm and 'sign off' school budgets for the 2023-24 financial year
February 21 <sup>st</sup>	School budgets signed off at Full Council meeting
By 28 <sup>th</sup> February	All schools notified of funding for 2022-23

16. In terms of setting the budgets for schools for 2023-24, the amount of funding available for distribution to schools will be calculated as follows.

DSG Schools Block Allocation	£343,027,141
Less: Growth Fund	x,xxx,xxx
Less: Transfer to Other Blocks	x,xxx,xxx
Total available for School Funding	<b>xxx,xxx,xxx</b>

## Initial Modelling

17. Initial modelling of the Schools Block demonstrates that the NFF is affordable, based upon the October 2021 census and therefore the full NFF could be implemented.

## Proposal

18. Schools Forum to make 'in principle' decisions for the following formula factors to enable school budgets to be prepared ready for the January 2023 meeting.
- To apply all the NFF factors in full
  - To set the Minimum Funding Guarantee at +0.5% (in line with NFF)

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