

AGENDA

Meeting: Schools Forum
Place: Online meeting - via Microsoft Teams
Date: Thursday 27 June 2024
Time: 1.30 pm

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

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Membership:	Representing:
Aileen Bates	WGA - Special School Governor Representative
Lyssy Bolton	Early Years Representative
TBC	Observer - Children and Families Voluntary Sector Forum
Andy Bridewell	PHF - Maintained Primary Representative
Helen Carpenter	Chair of WASSH - Secondary Academy Representative
Rebecca Carson	PHF - Primary Academy Representative
Michele Chilcott	WASSH - Secondary Academy Representative
Stella Fowler	WGA - Primary School Governor Representative
Jo Grenfell	Observer - Post 16, Wiltshire College
John Hawkins	Teaching Association Representative
Cllr Ross Henning	Observer - Local Youth Network
Georgina Keily-Theobald	WASSH - Maintained Special School Representative
Graham Nagel-Smith	PHF - Primary Academy Representative
Nick Norgrove	WASSH - Maintained Secondary School Representative
Lisa Percy	WASSH - 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
Karen Venner	Early Years Representative
David Whewell	WGA - Secondary School Governor Representative
Nicola Whitcombe	WASSH - Special School Academy Representative
Catriona Williamson	PHF - Maintained Primary Representative

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PART I

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

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

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

2 **Minutes of the Previous Meeting** (*Pages 7 - 26*)

To approve as a correct record and sign the minutes of the meeting held on 18 January 2024 (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 25 June 2024**. 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 20 June 2024** to allow a response to be formulated. Questions are limited to a maximum of 2 per person/organisation. A response will be given as either a direct oral answer or a written reply. Questions must not require the disclosure of confidential information. The Chair's ruling on rejection of a question is final.

6 **Updates from Working Groups** (Pages 27 - 40)

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

- Early Years Reference Group – 22 March 2024 and 7 June 2024 (*attached*)
- Joint meeting of the School Funding Working Group and SEN Working Group – 17 June 2024 (*attached*).

7 **Dedicated Schools Budget - Budget Monitoring 2023-24** (Pages 41 - 52)

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 2023-24 as at 31 March 2024.

8 **SEND Transformation Update** (Pages 53 - 62)

The report of Liz Williams (Finance Lead – High Needs Sustainability) and Ben Stevens (Inclusion, SEND and Alternative Provision Lead) seeks to update Schools Forum on the SEND Transformation Programme.

9 **Annual Schools Consultation - Transfer of funding from Schools Block to High Needs Block 2025-26** (Pages 63 - 66)

The report of Grant Davis (Schools Strategic Financial Support Manager) and Liz Williams (Finance Lead – High Needs Sustainability Programme) seeks to brief Schools Forum on the consultation questions and supporting information to be sent out to all schools in the autumn of 2024 on the principles and value of any block transfer from schools block to the high needs block in the 2025-26 financial year.

10 **Allocation of Funding Growth in Specialist Places** (Pages 67 - 70)

The report of Liz Williams (Finance Lead – High Needs Sustainability) seeks Schools's Forum agreement on the methodology for allocating funding for the growth in places in Wiltshire specialist provision from the high needs block.

11 **Review of EHCP Top-Up Funding - Key Principles**

The report of Liz Williams (Finance Lead – High Needs Block Sustainability) seeks views on the principles to be applied to a review of top-up funding that schools receive for pupils with Education Health and Care Plans (EHCPs) the report is *to follow*.

12 **Annual Schools Consultation** (Pages 71 - 76)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to brief Schools Forum and agree a set of questions to be sent out to all schools in the autumn of 2024.

13 **Early Years and Wraparound Childcare Update** (*Pages 77 - 80*)

The report of Lucy-Anne Bryant (Commissioning Manager) seeks to inform Schools Forum of the new legislation around early years and wraparound care.

14 **Confirmation of Dates for Future Meetings**

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

10 October 2024
12 December 2024
23 January 2025
13 March 2025.

15 **Urgent Items**

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

PART II

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

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Schools Forum

MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 18 JANUARY 2024 AT CONFERENCE SUITE, 1ST FLOOR, COUNTY HALL, TROWBRIDGE.

Present:

Lyssy Bolton, Andy Bridewell, Helen Carpenter, Rebecca Carson, Michele Chilcott, Stella Fowler, Jo Grenfell, John Hawkins, Cllr Ross Henning, Georgina Keily-Theobald, Graham Nagel-Smith, Nick Norgrove, Lisa Percy (Chair), Giles Pugh, John Read, Graham Shore (Vice-Chair), Trudy Srawley, Mike Thomas, Karen Venner, and Catriona Williamson

Also Present:

Adam Smith (Primary Heads Forum)

Grant Davis (Schools Strategic Financial Support Manager)
Ellen Ghey (Democratic Services Officer)
Richard Hanks (Co-Director – Education and Skills)
Lisa Pullin (Democratic Services Officer)
Ben Stevens (Sustainability Strategic Lead – High Needs Block)
Marie Taylor (Head of Finance - Children & Education)
Simon Thomas (FACT Programme Lead)
Deborah Williams (Strategic Financial Management Adviser)
Liz Williams (Finance Lead – High Needs Block Sustainability)

1 Apologies, Substitutions, and any Changes of Membership

Apologies for absence from Members were received from:

- Nikki Barnett
- Aileen Bates
- Ros Sutton
- David Whewell

Further apologies were noted from:

- Helean Hughes (Co-Director – Education and Skills), who had left Wiltshire Council
- Kathryn Davis (Interim Director – Education and Skills)
- Lisa Fryer (Head of SEND and Inclusion)
- Cate Mullen (Former Head of SEND and Inclusion), who had left Wiltshire Council
- Councillor Suzanne Wickham (Portfolio Holder for SEND and Inclusion)

2 **Minutes of the Previous Meeting**

The Part I (public) minutes of the previous meeting held on 5 December 2023 were presented for consideration.

Following which, it was:

Resolved:

The Schools Forum approved and signed the Part I (public) minutes of the previous meeting held on 5 December 2023 as a true and correct record.

3 **Chair's Announcements**

There were no Chair's announcements.

4 **Declaration of Interests**

There were no declarations of interest.

5 **Public Participation**

There were no questions or statements submitted.

6 **Updates from Working Groups**

The Chair raised the updates from the last joint meeting of the School Funding Working Group and SEN Working Group, and the last meeting of the Early Years Reference Group, both of which were held on 8 January 2024. There being no questions or comments on the updates, it was then:

Resolved:

The Schools Forum noted the updates from the last joint meeting of the School Funding Working Group and SEN Working Group and the last meeting of the Early Years Reference Group, both of which held on 8 January 2024.

7 **Update on FACT (Families and Children Transformation) Programme**

A verbal update on the FACT Programme was delivered by the FACT Programme Lead, Simon Thomas, who highlighted the following:

- Members were reminded that the FACT partnership looked at how to respond to different pressures in the system felt pre and post COVID

recovery, and to concentrate their collective energies into a combined approach focussing on the space of early intervention and prevention.

- The multi-agency 'Family Help' arrangements were briefly outlined in which it was explained that the approach focussed on enabling children, young people, and families to access the right help at the right time through a coordinated and robust system concentrating on identifying additional needs at the earliest point, building resilience across all residents, and providing joined-up support that prevented further escalation and late intervention services.
- The pilot scheme that had been operating in Westbury and Warminster since Spring 2023 was discussed and Members were reminded that the scheme was created to explore if working together in geographically defined areas in different ways could provide better and more effective early intervention and prevention. It was explained that additional resources had been allocated to the scheme to create further capacity to build on existing successes and to test and evaluate new methods of joint working.
- It was confirmed that additional funding had allowed officers to appoint Family Help and Early Help Mental Health Practitioners who were working directly with families and provided training, support, and advice to schools and other organisations. It was emphasised that establishing strong relationships and consistent, effective communication was critical to the success of the scheme and ultimately better supporting Wiltshire residents. These officers were based in school settings and were offering no appointment drop-in sessions and group work and were focussing on building and strengthening local communities.
- It was noted that the pilot scheme was considering more restorative approaches and analysing the general culture and behaviour of children and young people in school, not just those with challenging behaviour. The results of which would allow officers to understand what the local priorities were and how to best intervene at the earliest point.
- Further roles that had been recruited were detailed including a Pilot Locality Co-ordinator, and Family Hub Practitioners & Community Navigators, which would start in post in Spring 2024.
- Feedback had been received which noted that the existing system was relatively confusing, fragmented and disjointed. Therefore, officers had invested a lot of time and effort into creating a cohesive brand which covered all services providing early intervention and prevention, communicating to families, schools, and other relevant organisations. This had led to the development of an online platform, All Together, which was the single source for all relevant information for Wiltshire residents to peruse. It was emphasised that officers were focussing on a strong communications strategy to advertise this provision to ensure that residents were aware of how they could access the specific support they needed. The website can be found through this link: [All Together - Wiltshire Together](#)

- Members were then shown excerpts of feedback received from Wiltshire residents which had identified early success factors and areas for improvement such as upskilling front-line staff on working with families and tailoring services based on local need. Officers reassured Members that once further evaluation of all feedback had been conducted, the results would be circulated across the County.

In response to a question, it was clarified that the FACT initiative was a local scheme, therefore the Council did not receive any national funding from the Government bar the introduction of the Mental Health Champion role. However, it was explained that the program was jointly funded by Wiltshire Council, Health, and the Office of the Police and Crime Commissioner.

Members queried how officers would quantify and present the results of the pilot scheme and how long the funding was guaranteed for. In response, officers explained that they were in the process of launching an outcomes framework which would be used in tandem with a variety of short-term indicators such as family and partner feedback, Multi-Agency Safeguarding Hub (MASH) referrals, and school suspension data. In the longer term, officers would be looking at social mobility, and school attendance rates. It was confirmed that funding was secured until Spring 2025, however officers highlighted that as they were concentrating on increasing resource capacity, different investment options may have to be considered in due course.

At the conclusion of the discussion, it was:

Resolved:

The Schools Forum noted the update.

8 Dedicated Schools Budget - Budget Monitoring 2023-24

Marie Taylor, Head of Finance – Children & Education, presented the report which detailed the year end budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2023-24 as at 30 November 2023. The following was then highlighted:

- An overspend of £4.385m was forecast against the overall Schools budget. The main driver for this forecast variance was noted as being the ongoing pressures on the High Needs Block (HNB), however Members were reassured that the reasons for that were known and understood.
- As per Paragraph 4 it was explained that the Government acknowledged the deficits held by Local Authorities (LAs), which were estimated at £2.6bn nationally. As such, the Government introduced a three-year statutory override in 2020 which separated LAs DSG deficits from their wider financial position. However, it was confirmed that this override had been extended until 2026.

- Paragraphs 5 and 6 were then detailed before moving onto each block individually as per the order listed in the report.
- Paragraphs 7 to 9 referred to the Early Years budgets in which there was a projected underspend of £1.004m. The Early Years budgets had been decreased by £2.250m as a result of the planned transfer to the DSG reserve. However, it was emphasised that this would facilitate improved budget monitoring and should reflect the Department for Education's (DfE) post year adjustment of the variance which was due to actual children's attendance and therefore payments, being less than those calculated by the DfE using the updated census data.
- Paragraph 10 referred to the Schools Block budgets in which there was a projected underspend of £0.090m and was noted as relating to central teams and helping to offset the overall pressure on the DSG.
- Paragraphs 11 to 13 referred to the High Needs budgets in which there was a projected overspend of £5.606m. The High Needs budgets had already been increased by £18m as a result of the planned transfer to the DSG reserve in order to facilitate improved budget monitoring. It was explained that the main driver of the increased cost was volume with the number of Education Health Care Plans (EHCPs) being requested continuing to increase post pandemic which had exacerbated the existing pressure on the HNB as officers worked to reduce the pandemic EHCP assessment backlog and named pupil allowances. Officers further highlighted that Agenda Item 11, Safety Valve Programme Update, would provide a more detailed update on the High Needs Sustainability Team's work with the DfE and partners to investigate and address the issues faced.
- Paragraph 14 referred to the Central School Services budgets in which there was a projected underspend of £0.151m as a result of the underspend on central services and an underspend in admissions due to appeals panel income.
- Paragraphs 15 to 18 referred to the DSG reserve and management plan which outlined a breakdown of the reserve calculations and the introduction of the Safety Valve Programme. It was noted that once all calculations had been made, the DSG reserve had a forecasted deficit position of £56.247m.

Members expressed concern as to the degree of deficit, however acknowledged all the work that officers were doing to address and mitigate this figure.

There being no other questions or comments, it was then:

Resolved:

The Schools Forum noted the forecast budget monitoring position including the balance on the DSG reserve at the end of November 2023 together with the report later in the Agenda on the High Needs Block recover plan and the Safety Valve Programme.

9 **School Budget Setting 2024-25**

Grant Davis, Schools Strategic Financial Support Manager, introduced the item which would provide details on the overall funding settlement on each of the Funding Blocks and emphasised that the decisions for each of the Funding Blocks would be made during Agenda Item 10, School Budget Decisions 2024-25, after consideration of each of the update reports.

9a School Revenue Funding 2024-25 - Funding Settlement and Budget Setting Process

Grant Davis, Schools Strategic Financial Support Manager, presented the report and updated the Schools Forum on the revenue settlement announced by the Department for Education (DfE) on 19 December 2023, and budget setting process for 2024-25. The following was then highlighted:

- Paragraphs 4 to 7 were briefly detailed in which it was confirmed that for 2024-25 the Government had pledged to boost schools funding with an increase of £1.8bn (3.1%) into the overall Schools Block with a further £440 (4.3%) pledged for the High Needs Block (HNB). In addition, the Teachers Pay Additional Grant (TPAG) would continue in the 2024-25 year, totalling a further £900m. Furthermore, there would be an additional grant to reflect the additional cost of the increase to employer contribution rates for the Teachers Pensions' Scheme from April 2024, with details of how the grant would be calculated made available in due course.
- Paragraphs 10 to 12 discussed the National Funding Formula (NFF), and it was confirmed that 2024-25 would be another 'soft' year with the Schools Forum retaining their role in determining the school funding allocation methodology. The DfE had further confirmed their intention to move to a 'hard' NFF by 2027-28, however it was reiterated that as Wiltshire's local school formula already mirrored the NFF, any tightening of the formula would have a minimal impact on Wiltshire schools.
- Paragraph 14 referred to the Minimum Funding Guarantee (MFG) and it was reiterated that the Schools Forum had agreed to set the threshold at the maximum 0.5% to be consistent with previous years and to ensure that all schools received a minimum uplift in their per pupil funding of 0.5%.
- Officers then listed the changes to the main formula as per Paragraph 15.
- As per Paragraph 18, it was confirmed that the Pupil Premium Grant (PPG) funding would continue with the rates being uplifted by 1.5% and the numbers of eligible PPG pupils taken from the October 2023 census.
- The school revenue funding settlements for each of the Funding Blocks were then detailed as per the order listed in the report.

- It was confirmed that the provisional Dedicated Schools Grant (DSG) allocation for Wiltshire Council was £493.461m, an increase of £41.165m from 2023-24, with the table in Paragraph 19 showing the breakdown of the Funding Blocks and the table in Paragraph 22 showing the year-on-year split of funding between Blocks.
- Paragraph 25 detailed pupil movements year-on-year and it was highlighted that Wiltshire was seeing a drop in the birth rate for children starting Primary School whereas Secondary Schools were seeing a surge in numbers which was indicative of the change in demographics within the County.
- Paragraphs 27 to 32 provided updates on the Central School Services Block (CCSB), HNB, and Early Years Block (EYB). Officers drew particular attention to Bullet Points 6 and 7 of Paragraph 28 and Paragraph 30 which highlighted that EYB funding had provisionally increased by over £20m which reflected the increased provision being made available within the early years sector.
- Paragraphs 33 to 34 referred to Funding Block transfers and it was reiterated that the Schools Forum had previously agreed to a transfer of up to a maximum of 0.55% from the Schools Block to the HNB if affordable. As such, due to the requirement that any transfer in excess of 0.5% would require the express approval from the Secretary of State, Members were informed that a Disapplication Request to transfer 0.55% had been submitted with a decision pending. However, officers were expecting to receive support in light of the Council's Safety Valve Programme and the backing of the Schools Forum.
- Paragraphs 35 to 40 referred to the budget setting process for 2024-25 and de-delegation, with Paragraph 36 detailing the breakdown in the calculation for the Schools Block funding available for distribution to schools. It was further confirmed that financial modelling had confirmed that the NFF was fully affordable taking into account the Block transfer of £2m and setting a Growth Fund of £734k.
- Finally, it was noted that at the December 2023 meeting of the Schools Forum, Maintained Schools voting Members agreed that the de-delegation of services would continue in 2024-25 and that Maintained Schools would de-delegate funding to support school improvement services.

In response to queries, officers reassured Members that as the Wiltshire schools funding formula mirrored the NFF, there would be no implications on Wiltshire schools when the DfE moved to a 'hard' NFF. Furthermore, there could be scenarios in the future where there could be affordability concerns, but it was emphasised that the decisions made by the Schools Forum were resilient and as there were no plans for any new school developments in the near future, it bolstered decision making and left the Council in a good financial position.

At the conclusion of the discussion, it was then:

Resolved:

The Schools Forum noted the report.

9b Dedicated Schools Budget - Schools Block Update 2024-25 (Delegated Budget)

Grant Davis, Schools Strategic Financial Support Manager, presented the report and updated the Schools Forum on issues relating to the schools delegated budget for 2024-25 and the decisions that needed to be made as part of the budget setting process. The following was then highlighted:

- Paragraphs 2 to 4 detailed the main considerations for Members, with officers drawing particular attention to Paragraph 3 which listed the notable changes to the main funding formula for 2024-25.
- Paragraphs 5 to 9 were discussed and referred to the National Funding Formula (NFF) where officers again emphasised that based upon the School's Block allocation, the formula was fully affordable for the 2024-25 financial year, applying all the NFF factor values.
- Paragraphs 10 to 15 referred to the Growth Funding and Falling Rolls Allocations for 2024-25 and it was noted that for the first time, the Department for Education (DfE) had issued funding to Local Authorities (LAs) based on falling rolls. However, it was reiterated that at the December 2023 meeting of the Schools Forum, Members had decided to not introduce a Falling Rolls Fund for 2024-25 based on a number of factors. Furthermore, at the December 2023 meeting, Members confirmed the criteria for allocating Growth Funding.
- Paragraphs 16 to 20 were then briefly detailed referring to the historical position and affordability considerations.
- Sparsity and Split Site Funding were then briefly discussed as per Paragraphs 25 to 31 and officers noted that Members had agreed to mirror the NFF sparsity changes within the Wiltshire formula. Furthermore, it was highlighted that the DfE had determined that funding for split sites would be based upon a two-pronged criterion: Basic Eligibility and Distance Funding. Paragraph 31 detailed the implications of such on those applicable schools in Wiltshire.
- Paragraphs 32 to 35 referred to Minimum per Pupil Funding Levels (MPPFL) and it was highlighted that as the NFF was embedded, the quantum of funding awarded through the MPPFL, and the number of schools eligible to receive funding, should continue to decrease.

There being no questions or comments, it was then:

Resolved:

- 1. The Schools Forum noted the report.**

2. **The Schools Forum confirmed its intention to apply all the funding factors at the 2024-25 National Funding Formula rates.**
3. **The Schools Forum confirmed the setting of the Minimum Funding Guarantee at a level of 0.5%, as being fully affordable.**
4. **The Schools Forum confirmed the transferring of 0.55% (£2.0m) of the Schools Block to the High Needs Block, as the full National Funding Formula was affordable.**
5. **The Schools Forum agreed to the level of the Growth Fund at £0.734m.**

(The decisions numbered 2 – 5 above, were made later in the meeting under Agenda Item 10)

9c Dedicated Schools Budget - High Needs Block Update 2024-25

Liz Williams, Finance Lead – High Needs Block Sustainability, presented the report which updated the Schools Forum on issues relating to the High Needs Block (HNB) for 2024-25 and the decisions that needed to be made as part of the budget setting process. The following was then highlighted:

- It was reiterated that the budget approach for 2024-25 was approved in principle at the December 2023 meeting of the Schools Forum with the final allocations being published in the interim. It was further noted that the budget proposals reflected Year 1 of the proposed Safety Valve Programme Plan submitted by the Council in December 2023, with the final draft of the plan being submitted on 12 January 2024.
- Paragraphs 4 to 6 detailed the main considerations for Members, and it was emphasised that due to the interdependencies of decisions across all of the Funding Blocks, final decisions on the HNB would be presented alongside those that Members were required to make on all other Blocks.
- Officers drew particular attention to Paragraph 8 which explained that the increase in the deficit took into account the provisional HNB allocation announced in December 2023 and an assumption of a transfer of £2.0m from the Schools Block, which was agreed in principle by Members in the December 2023 meeting.
- It was explained that Appendix 1 provided an assessment of the pressures on the HNB for 2024-25 with the impact of those pressures giving an unmitigated in year deficit of £28.535m. Thus, posing a significant financial risk to the Council.

- The Safety Valve Programme was raised, and it was reiterated that the Plan aimed to bring the HNB spend into an in year balanced position within a 5-year period. Paragraph 11 listed a breakdown of the costs and savings arising from the planned mitigating actions as part of the Safety Valve Programme, with the proposed mitigated budget of £106.3m shown in Appendix 2.
- Finally, Paragraphs 13 to 16 detailed the Special School Minimum Funding Guarantee and the Dedicated Schools Grant (DSG) deficit reserve and management plan as discussed in previous Agenda Items.

There being no questions or comments, it was then:

Resolved:

The Schools Forum noted the pressures on the High Needs Block for 2024-25 and the mitigating actions which reflected Year 1 of the Safety Valve Programme Plan.

9d Dedicated Schools Grant - Early Years Block Update 2024-25 (Indicative Allocations)

Marie Taylor, Head of Finance – Children & Education, presented the report which updated the Schools Forum on issues relating to the Early Years Block (EYB) for 2024-25 and the decisions that needed to be made as part of the budget setting process. The following was then highlighted:

- Paragraphs 3 to 9 detailed the main considerations for Members and noting that in the Spring budget of 2023, the Government had launched a largescale Childcare Expansion which included increased funding rates and extensions to the age entitlements for parents of eligible children. As such, the provisional EYB settlement for Wiltshire was £52.886m with Paragraph 5 showing a breakdown of the different funding elements.
- Officers drew Members' attention to Appendix 1 and Paragraph 7 which listed the criterion in place for setting a local formula and the main changes to the Early Years Entitlements: Local Authority Operational Guide 2024-25 which was published in November 2023; Bullet Points 1 and 2 of Paragraph 7 were specifically highlighted for Members' awareness. It was further confirmed that the criterion had been universally agreed at the Early Years Reference Group (EYRG).
- Appendix 2 detailed the Council's passporting process in which it was proposed that 100% of the 2-year-old disadvantaged funding would be passed through to providers and 95% minimum of the other funding streams.
- Paragraph 10 noted that in the 8 January 2024 meeting of the EYRG, Members had considered a number of funding options, attached as

Appendix 1a and 1b, with the consensus being to support the Council's recommendations as listed under the paragraph.

- Paragraphs 12 to 14 referred to the Special Educational Needs Inclusion Fund (SENIF) of which £0.200m had been earmarked to link to Workstream 1 of the Safety Valve Programme. It was highlighted that as part of the preventative inclusive agenda and the recovery actions for the High Need Block (HNB) budget, an additional sum of £0.180m had been ringfenced from the HNB to support children with an Education Health Care Plan (EHCP) in the early years sector. Demand on this fund had been reflected in the budget estimate.
- Paragraphs 15 to 22 detailed the Disability Access Fund and Early Years Pupil Premium proposals which were fully passported to providers as per the DfE guidance. Furthermore, unspent funds would be returned.

There being no questions or comments, it was then:

Resolved:

1. The Schools Forum noted the update on the Early Years Block and agreed to the Local Authority preferred proposal.

Local Authority Preferred Proposal:

a. To set the following basic hour provider rates for entitled children:

i)	Under 2-year-olds	£9.63
ii)	2-year-olds	£7.17
iii)	Disadvantaged 2-year-olds	£7.48
iv)	3 and 4-year-olds (universal and working parents)	£5.21

b. That the Central Early Years' Team budget be set at £0.859m.

c. That the Special Educational Needs Inclusion Fund be set at £1.142m.

d. Increase deprivation and rurality to reflect current spending levels at £250,000.

2. The Schools Forum agreed up to £900 per child for 2024-25 from the Disability Access Fund with the Local Authority to passport the funding.
3. The Schools Forum agreed to the uplift in funding for Pupil Premium to be set at £0.68 per hour with the Local Authority to passport the funding.

4. **The Schools Forum agreed to maintain at least 95% of funding to be passed through to providers.**
5. **The Schools Forum noted that all other funding factors remain at current 2023-24 levels, or funded levels.**

(The decisions numbered 1 – 5 above, were made later in the meeting under Agenda Item 10)

9e Dedicated Schools Budget - Central School Services Block Update 2024-25

Marie Taylor, Head of Finance – Children & Education, presented the report which updated the Schools Forum on issues relating to the Central School Services Block (CSSB) for 2024-25 and the decisions that needed to be made as part of the budget setting process. The following was then highlighted:

- It was noted that Members approved the proposed budget in principle at the December 2023 meeting of the Schools Forum, with officers informing Members that the only change since that time was that the actual charge for copyright licences had still not yet been received from the Department for Education (DfE) as negotiations with the Copyright Licencing Agency were ongoing. It was clarified that a best estimate had been used and any amendment would change the contribution to the High Needs Block.
- As per Paragraph 3 it was confirmed that the Council had received a CSSB allocation of £2.643m which was calculated using the NFF for the CSSB. Funding for agreed historic commitments for 2024-25 was then added to the amount of funding generated by the formula to give the overall total CSSB.
- Officers then briefly explained the function of the CSSB, and the decisions needed to be made as per Paragraphs 5 to 14, with particular attention paid to Appendix 2 which outlined the proposed budget for each of the services covered.
- It was noted that assuming the proposed budget was accepted, an amount of £0.025m unallocated CSSB was estimated to be transferred to fund high needs pressures, with officers referring to the table under Paragraph 14.

There being no questions or comments, it was then:

Resolved:

The Schools Forum noted the changes in the table under Paragraph 14 of the report, Page 72 of the Agenda Pack, and considered the required

decisions below to the Central Schools Services Block budget for 2024-25 as itemised in Appendix 2 and below:

- i. **Section A: Central Copyright Licences – Consult Only (*the Department for Education have confirmed that they are still negotiating rates with the Copyright Licencing Agency*).**
- ii. **Section B: Central Functions – Approve on a Line-by-Line Basis**
- iii. **Section C: Historic Commitments – Approve on a Line-by-Line Basis**
- iv. **Including the transfer of surplus Central Schools Services Block grant to support the High Needs Block.**

(The decisions numbered i – iv above, were made later in the meeting under Agenda Item 10)

10 **School Budget Decisions 2024-25**

The Chair led Members through the decisions to made, and it was then:

Resolved:

Overall Budget

1. The Schools Forum agreed to set the overall Schools Budget above the level of the Dedicated Schools Grant Settlement. Namely, £521.635m, including the additional drawdown from the Dedicated Schools Grant reserve to support the High Needs Block budget.

Central Schools Services Block

2. The Schools Forum noted the Local Authority Decision to set the budget at £0.511m for Central Copyright Licences for 2024-25 (Section A)
3. The Schools Forum agreed the expenditure for the Central Schools Services as follows (Section B):

i)	Education Welfare Service	£0.241m
ii)	Asset Management	£0.225m
iii)	Statutory/Regulatory Duties	£0.810m
iv)	Admissions	£0.502m
v)	Servicing of Schools Forum	£0.003m
vi)	Centrally Retained Teachers Additional Pension Costs	£0.138m

4. The Schools Forum agreed the central spend on Historic Commitments as follows (Section C):

i)	Funding for LAC Personal Education Plans	£0.103m
ii)	Child Protection in Schools Adviser	£0.056m
iii)	Prudential Borrowing	£0.029m

5. The Schools Forum noted that these allocations allowed a transfer of £0.025m to support the High Needs Block.

Schools Block – Delegated Budget

6. The Schools Forum agreed to apply all the funding factors at the 2024-25 rates.
7. The Schools Forum agreed to set the Minimum Funding Guarantee at a level of 0.5%, as being fully affordable.
8. The Schools Forum agreed the level of Growth Fund at £0.734m.
9. The Schools Forum confirmed transferring 0.55% (£2.0m) of the Schools Block to the High Needs Block, as the full National Funding Formula was affordable. *This transfer exceeds the 0.5% threshold for Schools Forum approval, therefore the Department for Education require confirmation that Schools Forum Members have voted on this proposal. As such, please find a record of the voting below:*

Member Name:	For	Against	Abstain
Lyssy Bolton	√		
Andy Bridewell	√		
Rebecca Carson	√		
Helen Carpenter	√		
Michele Chilcott	√		
Stella Fowler	√		
John Hawkins	√		
Georgina Keily-Theobald	√		
Graham Nagel-Smith	√		
Nick Norgrove	√		
Lisa Percy	√		
Giles Pugh	√		
John Read	√		
Graham Shore	√		
Mike Thomas	√		
Karen Venner	√		
Catriona Williamson	√		

10. The Schools Forum noted that the previously agreed budgets for de-delegation of Central Services were set as follows:

i)	Access Budget Software	£58,255
ii)	FSM Eligibility	£30,218
iii)	Trade Union	£31,577
	<i>Total Budget: Academies and Maintained</i>	<i>£90,000</i>
iv)	EMAS & Travellers	£589,911
v)	Behaviour Support	£694,579
vi)	Maternity Supply	£606,825
vii)	School Improvement (LAMB)	£459,000

High Needs Block

11. The Schools Forum noted the pressures on the High Needs Block for 2024-25 and the mitigating actions which reflect Year 1 of the Safety Valve Programme Plan.

12. The Schools Forum agreed to set the Special School Minimum Funding Guarantee uplift at 0.5% for 2024-25, in line with Mainstream Schools.

13. The Schools Forum agreed to set the 2024-25 Top Up rates for Special Schools, Resource Bases, ELP's (Enhanced Learning Provision in Secondary Schools), and NPA's (Named Pupil Allowances in Mainstream Schools), to increase by 4%, in line with inflationary pressures in schools.

Early Years Block

14. The Schools Forum agreed to set the following basic hour provider rates for entitled children:

i)	Under 2-year-olds	£9.63
ii)	2-year-olds	£7.17
iii)	Disadvantaged 2-year-olds	£7.48
iv)	3 and 4-year-olds (universal and working parents)	£5.21

15. The Schools Forum agreed up to £900 per child for 2024-25 from the Disability Access Fund, with the Local Authority to passport the funding.

- 16. The Schools Forum agreed to the uplift in funding for Pupil Premium to be set at £0.68 per hour, with the Local Authority to passport the funding.**
- 17. The Schools Forum agreed to maintaining at least 95% of funding to be passed through to providers.**
- 18. The Schools Forum agreed that the Central Early Years Teams budgets be set at £0.859m.**
- 19. The Schools Forum agreed that the Special Educational Needs Inclusion Fund budget be set at £1.142m from the Early Years Block.**
- 20. The Schools Forum noted the deprivation and rurality increase to reflect current spending levels at £250,000.**
- 21. The Schools Forum noted that all of other funding factors remain at current 2023-24 levels or funded levels.**

11 Safety Valve Programme Update

Liz Williams, Finance Lead – High Needs Block Sustainability, presented the report which updated the Schools Forum on the draft Safety Valve Plan and highlighted the changes that were made in response to Department for Education (DfE) feedback in advance of the 12 January 2024 submission to the Secretary of State for approval, and to form the basis of a Safety Valve Deal for Wiltshire. The following was then highlighted:

- The main considerations for Members were detailed as per Paragraphs 8 to 18, with particular attention drawn to Paragraphs 9 and 11 which noted the updates to the unmitigated pupil number forecast to include the children and young people currently awaiting assessment, and the milestones that had been added to the plan to provide further assurance that it was deliverable.
- As discussed in earlier Agenda Items, it was confirmed that a Disapplication Request had been submitted to the Secretary of State for a block transfer above 0.5% from the Schools Block to the High Needs Block.
- It was further confirmed that a capital request to support the plan was also submitted on 5 January 2024 which was intended for the expansion of Special Schools places in the South of the County to directly contribute towards the delivery of Workstream 2.

- Officers noted that it was expected that approval would be given for the plan in its final form following positive feedback from DfE advisers. Therefore, if approved, officers were anticipating that the Government would send a Safety Valve Deal for review and signature before April 2024.
- The financial implications and risks that may arise if the proposed decisions were taken or not taken were listed as per Paragraphs 19 to 28. The significant financial risk and pressure that the forecast High Needs Block (HNB) deficit presented to the Council was again stressed and Members were reassured that given the ambitious nature of the plan, the Programme Team had commenced the first stages for the delivery of the plan immediately to ensure that key conversations were already happening before April 2024.
- Finally, officers confirmed that further updates would come to future Schools Forum meetings as officers developed implementation plans. Therefore, Members should consider it as a standing item on the Schools Forum agenda for the foreseeable future.

In response to Member questions, officers confirmed that the Dedicated Schools Grant (DSG) was ringfenced at present but highlighted that this could change pending the approval of the Safety Valve Agreement, as Council contributions may be required. It was also emphasised that there was a HNB deficit across the Country which was estimated to be in the region of £3.6bn by March 2025. As such, there were many other Local Authorities experiencing high or increasing deficits and who were therefore implementing Safety Valve or Delivering Better Value Programmes to address and mitigate these issues. Accordingly, Wiltshire was not considered an outlier.

Members noted that they were pleased to see that the feedback received from the DfE for the draft submission of the plan was minor and constructive which they felt was a reflection of the dedication and commitment of Ms Williams and the other officers associated with the project; all were commended for their hard work.

Following which, it was:

Resolved:

The Schools Forum noted:

- a. The updates to the Dedicated Schools Grant Management Plan and the SEND Sustainability Plan.**
- b. The submission of those documents to the Department for Education on 12 January 2024.**
- c. The continued progress to reduce and remove the financial risk that the deficit in the High Needs Block represented.**

12 **Confirmation of Dates for Future Meetings**

The date of the next meeting was confirmed as Thursday 14 March 2024 at 1.30pm and was planned to be held remotely via Microsoft Teams.

Future meeting dates were confirmed as below:

27 June 2024 – 1.30pm
10 October 2024 – 1.30pm
12 December 2024 – 1.30pm
23 January 2025 – 1.30pm
13 March 2025 – 1.30pm

13 **Urgent Items**

There were no urgent items.

14 **Exclusion of the Press and Public**

The Schools Forum considered the recommendation to exclude the public. Following which, it was:

Resolved:

To agree that in accordance with Section 100A(4) of the Local Government Act 1972 to exclude the public from the meeting for the business specified in Item Number 15 because it is likely that if members of the public were present there would be disclosure to them of exempt information as defined in paragraph 3 of Part I of Schedule 12A to the Act and the public interest in withholding the information outweighs the public interest in disclosing the information to the public.

15 **Schools Forum Minutes**

The Part II (private) minutes of the previous meeting held on 5 December 2023 were presented for consideration.

Following which, it was:

Resolved:

The Schools Forum approved and signed the Part II (private) minutes of the previous meeting held on 5 December 2023 as a true and correct record.

(Duration of meeting: 1.30 - 4.05 pm)

The Officer who has produced these minutes is Ellen Ghey of Democratic Services,
Tel 01225 718259 or email committee@wiltshire.gov.uk

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

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Agenda Item 6

Schools Forum

School Funding and SEN Working Group

MS TEAMS MEETING

17 June 2024

Minutes

Present: Marie Taylor (Chair), (Finance, local authority ((LA)), Grant Davis (Finance, LA), Kathryn Davis (Director, Education & Skills), Lisa Fryer (HOS, SEN & Inclusion), Liz Williams (Finance Lead – High Needs Block Sustainability), Ben Stevens (High Needs Block Sustainability Strategic Lead), Lisa Percy (Chair of SF / Hardenhuish), John Hawkins (Teacher / Governor rep), Catriona Williamson (Mere), Graham Nagel-Smith (Morgan’s Vale & Woodfalls), Graham Shore (Deputy Chair SF / Holy Trinity), and Rebecca Carson (Woodford Valley)

Apologies: Andy Bridewell (Ludgershall Castle), Simon Thomas (LA), Georgina Kiely-Theobald (Downland)

1.	Welcome and Apologies MT welcomed the group to the virtual meeting.	
2.	Minutes There were no outstanding actions.	
3.	Matters Arising There were no matters arising.	
5.	Schools Funding (DSG) Budget Monitoring Provisional Outturn (MT) MT shared her report & appendices – highlights, underspends in EY post financial year adjustment and in year adjustment by the DfE both under £0.1m. Schools block small underspend offsets the HNB pressures. HNB pressures in line with demand for services and rising demand patterns – slight improvement since the previous report due to assumptions made around numbers in the final quarter of the year. First Safety Valve payment received from the DfE at £26.8m which reduces the deficit reserve balance to £28.706m at the end of the financial year. Provisional overspend £3.645m + previous drawdown from the reserve £16.648m – total in year pressure of £20.293m a slight improvement on both what was shared as a plan with the DfE and what was last reported to Schools Forum. The 2024/25 budget monitoring will be shared at the next meeting in order to align with the Cabinet reporting timetable. <i>RC asked – if there is a change of Government, will there be cost implications for ISS schools? Confirmed no as long as VAT remained reclaimable on education services GS suggested working with ISS schools who may be struggling financially – to explore whether they have room on their school sites for some specialist provision – KD to consider with LT/ MT</i>	KD/MT

6. HNB Suite of Reports (LW/BS)

a. SEND Transformation Update

LW took us through the report – this is the Council’s largest financial risk. SV agreement DfE funding £67m (~£26.8m received to date) and the council is contributing £70.2m over the recovery period. Recruitment progressing well – first quarterly monitoring report to the DfE will be to the end of May. £6.7m due in 2024/25 from the DfE. Still waiting to hear whether the £5.7m DfE SV capital bid was successful. Some projects are rated amber – LW outlined the reasons which were around timing and recruitment.

MT asked – how will we ensure all schools are engaged? KD responded there would be support and healthy challenge by the SEN & Inclusion advisers. Reminded schools we are open to pilots from schools and there is earmarked funding for these.

GS shared independent assessments often recommended an EHCP and some schools were not inclusive, often recommending other, nearby schools for children with additional needs. LP agreed this was also happening in secondary especially where CYP were more complex and parents more demanding.

KD responded the LA are working with health professionals but there is little we can do to influence the private health specialists. KD shared that where it was known schools were telling parents they could not meet need she was having very robust conversations with the leadership team of those schools.

CW said there were situations where parents were insistent an EHCP was required, were using the complaints route to get one even when professionals did not recommend a plan

KD responded the LA need to ensure the EH offer is really robust and covers social challenges and approaches to parenting. Three new staff in IFD to change culture in the LA so the default is to look holistically at that child’s situation and not recommend assessment in place Sept 24.

GS – following a period of poor attendance at school – an EHCP is not the best route of entry back in but that’s often recommended. KD responded – needs to be REP oversight and we have Melksham House and The Northwood Centre for CYP with EBSA, anxiety concerns – an EHCP adds nothing for these CYP.

b. Consultation on Block Transfer for 2025/26

LW took the group through her report which outlined the proposed questions for the consultation on a block transfer from schools block to high needs block in 2025/26. The Safety Valve agreement includes an assumption of a 1% block transfer and the report proposed the information that would be required to support the consultation to enable schools to assess the benefits and impact of the transfer.

LP asked about the process given that the Safety Valve plan already assumes a 1% transfer. LW responded that the assumption is in the plan however decisions on a block transfer have to be made on an annual basis. When Ministers consider any disapplication request they will want to understand the views of schools and what consultation took place.

	<p><i>LP noted that the schools block does not cover the post-16 age range and that she had concerns about a transfer being required to support increasing post-16 costs in the high needs block.</i></p> <p>GD shared initial modelling of methodologies to manage any reduction in NFF formula factor values. It was agreed that the consultation should reflect the impact on AWPUs as this ensures any reduction is applied in the same way across all schools.</p> <p>It was agreed that the consultation would need to include information on the impact on schools and the additional investment that a transfer would facilitate. It was also agreed that the consultation should be discussed at WASSH and PHF during the autumn term.</p> <p>c. Growth Funding for Specialist Places – LW summarised the key issues in the report which proposes a formulaic approach towards supporting significant growth in specialist settings.</p> <p><i>LP asked how the proposed funding compared with spend in 2023/24 using a less formulaic approach. LW confirmed that this would be incorporated into the report for Schools Forum.</i></p> <p><i>LP asked whether the increase in places always necessitated additional staffing. LW responded that the proposed growth would be applied where schools are increasing their planned place numbers significantly – for example 40 or 50 places in a new school year.</i></p> <p>d. EHCP Top-Up review – initial principles. LW outlined her report which outlined the principles to be applied to a review of EHCP top-up payments. It was noted that the report would be issued as a supplementary item for Schools Forum as it needed to be shared with Cabinet before publication.</p>	
7.	<p>Annual Consultations – De-delegation (GD)</p> <p>GD presented the annual de-delegation consultation report for maintained schools. Each year, the questions to be asked of maintained schools are presented to the group to confirm their acceptance of the consultation questions.</p> <p>No amendments were proposed to the questions posed from the 2024-25 consultation.</p>	
8.	<p>PHF Reps / Proportions</p> <p>GD presented a verbal update to the group to confirm that despite the recent cohort of academy conversions, no changes would be required to the current membership proportions. The Clerk to Schools Forum will present the numbers formally at the October Schools Forum meeting.</p>	
9.	<p>AOB</p> <p>There was no AOB however following the meeting, CW updated MT that AB would no longer attend the working group but we are not losing him from Schools Forum, CW will ensure AB is updated and of course, papers will still be shared.</p>	
10	<p><i>Date and Time of next Meeting</i></p>	

	SFWG 8.30 30 th September 2024, Schools Forum 1.30pm 10 th October 2024 This is planned as a virtual teams meeting.	
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**Early Years Reference Group Meeting
Friday 22 March 2024**

1. Welcome and introductions

Lyssy Bolton (LB), Jane Boulton (JB), Lucy-Anne Bryant (LAB), Emma Cooke (EC), Jackie Day (JD), Emma Egan (EE), Charlotte Forester (CF), Jenny Harvey (JH) (notes), Marie Taylor (MT), Emily Wood (EW), Karen Venner (KV), Kerry Yeates (KY)

LAB introduced and welcomed Gemma Oakley, Assistant Commissioner for Early Years Sufficiency to the group.

2. Apologies

Sarah Hawkins, Julia Honeywell, Kirsty Merrifield, Debbie Muir, Kai Muxlow, Emma Osmund, Naomi Wright

3. Minutes of last meeting (8 January 2024)

The minutes were agreed as a true record.

4. Matters arising

Item 4 – Parent Declaration form. A new form has been published on the website incorporating the old consent for 30 hours form and the new 2 year old Working Parent Entitlement codes. However, it was not possible to extend beyond a financial year as the funding is issued on this basis.

Item 5 – Capital funding survey. EW confirmed that there was a 54% survey submission rate which is providing Wiltshire Council with a rough gauge of what is happening around the county. EW commented that a higher rate of return would have been preferred to provide a more accurate picture.

Item 6 – Wrap around childcare. LAB advised schools with resources bases had been included in the expression of interest SNAP survey.

Item 7 - BACS remittances. MT/EW advised these should now be being received by all providers.

Item 7 - Payment schedule. EW advised this hasn't been progressed, will look to do for next financial year.

Item 7 – SENIF. EC advised there is currently no new data to share with the group, but this will be a rolling agenda item.

Item 8 – Supplementary rates underspend. MT advised this was linked to a coding error and is now resolved.

ACTION: None

5. Budget Monitoring (MT)

MT shared the current budget monitoring report with group.

Essentially, there is an underspend in EY, and a variance in the Schools Block around the growth fund. There is pressure in the high needs block (approximately 16.6 million), with rurality a further £5million on top of this.

The DfE have now agreed to a 5 year safety valve arrangement plan which will have short to medium term impact. The first payment of the safety valve arrangement for £26.8 million will be made on 28 March 2024.

In December 2023 a variance of £1.8 million underspend was forecasted across the EY block, and previous pressures on ISF were forecasting a slightly bigger underspend which is now a bit smaller. There is a larger underspend on the EY central expenditure block.

Budgeted activity (PTE) shows fewer 3&4 year olds and slightly more 2 year olds. LB asked what is being forecasted next year as expect this will look very different. MT advised that we need to assume that all will be spent. It will be interesting to see what the actual take up will be as its thought it will be more about what parents are able to access rather than what they want to access.

EE queried what happened to any excess budget. MT advised that it could be reutilised, although it could not be given out as additional funding for 2, 3 & 4 year olds as the regulations do not allow this. It would still be a welcome help however it is reutilised.

MT felt it would be a good idea if someone could attend one of the next meetings to speak about safety valve arrangement. Ben Stevens was suggested to receive an invite to the next meeting.

EC informed the group that last year's budget underspend subsidised last year's EY conference.

EW commented that the drop in PTE could possibly be linked to a drop in the birth rate. Forecasting is done on the number of children in settings at a point in time, and the DfE do a post year adjustment using January census data, so there is a possible risk of funding being removed.

ACTION: LAB/MT to invite Ben Stevens to next meeting to speak about the safety valve arrangement

6. Early Years Entitlement Expansion

LAB advised that capital funding is still available. 3 settings have got an agreement to date (Melksham, Westbury, Dilton Marsh). Other settings are expressing an interest. The DfE are challenging why Wiltshire Council have said they won't meet targets for childcare places. Rurality is a key issue, and the council weren't given additional funding (£1000) for staff.

LB asked if the criteria could be forwarded to her to see if anyone across the trust can expand their offer.

KV asked about the number of places being offered by the new Melksham nursery which LAB confirmed as 40.

(CF joined the meeting at 10am)

LB confirmed that 2 year olds returned to Rivermead from January 2024.

LAB confirmed that the Forest area of Melksham is an area of deprivation. LB asked for additional information on this.

LAB advised the group on a concerningly low number of validated codes for the new 2 year old Working Parent Entitlement starting 1 April 2024. Our figure is currently below the national average. EW advised that Wiltshire Council had asked the DfE how the figure is calculated, with the DfE stating through portal and manual checks. We are hoping it is just the younger cohort of the age group as it is highly unlikely that any of the new 2 year old Working Parent entitlement codes are invalid.

KV commented that their parents are sending in screenshots of their funding portal confirmation, so no validation process has been carried out yet by the setting on the Establishment Portal as they are trying to streamline the process.

CF said they have had a few enquiries from parents, and that possibly there could be parents unable to find available childcare. If parents are struggling to find a space, do Wiltshire Council have a database of available places? EW/LAB confirmed no, and that providers should pass onto others.

JH advised there seemed to be more code validation requests for the younger age cohort submitted this last week. LAB also suggested that perhaps more parents are using out of county provision.

LAB informed the group that she thought there were enough places as eligible 2 year olds are more than likely already attending a provision, so the paid place will convert to a funded one. However, we will keep developing this moving forward.

ACTION: LAB to forward LB the criteria for capital funding expansion
LAB to provide LB with additional information on the Forest area

7. Wrap around childcare development (LAB/All)

LAB informed the group that a presentation has been made at headteacher and governor briefings informing them it is their statutory duty to provide spaces. A capacity data return is due next week which will enable the local authority to look at areas of need. The government want local authorities to over supply the market. Wiltshire Council doesn't want to put any existing business out of business, so we need to work out how to dovetail this in with existing provision. Some schools have already expressed their interest.

CF advised they used to have 2 after school clubs (ASC); they now just have 1. CF asked if there will be support with transport as she is unable to justify employing 6 people to drive to different schools to collect children and bring back to ASC provision. LAB/EC confirmed no support for transport was available.

LB raised the issue of food provision. Some rural schools get food for their children from main schools. If children are to be there until 6pm, then food will also be needed.

JD queried how wraparound care will work with schools open only 38 weeks of the year. LAB/EC advised that only term time funding is available with this piece of work, but LAB agreed that we need to look at how this could be managed during the holidays. LB referred to CF's case, and suggested modelling case studies for a small school. If the business case requires funding staff to drive to transport children to the setting – this could be raised with the DfE as a query. LAB stated that we need to test what works and how it can be managed. CF asked if there were any parameters on food being offered; EC confirmed there weren't.

ACTION: None

8. Local Provider Agreement – update version (JH/All)

Prior to the meeting, the draft Provider Agreement (based on new DfE regulatory guidance) had been shared with the group.

The group discussed the lack of clarity in the working around charging.

EE commented they won't be delivering the new 2 year old Working Parents entitlement in this first term as they cannot afford to offer it. For them, the numbers don't add up, and they don't want parents sending in snacks.

LAB/EC advised that local authorities are being increasingly challenged by the DfE and Ombudsman on this topic. The local authority must ensure a balance between providers charging for services over and above the basic childcare in line with the guidance, whilst at the same time being open and honest with parents about their charges and, being mindful of parents struggling financially.

KV advised that she informs her parents that the meal charge pays for cook wages.

KV also asked if the entitlement eligibility start dates would be reiterated, i.e. 1 April, 1 September, and 1 January.

EW asked the group if the local authority needed to do more on promoting tax-free childcare, and did providers feel it was a useful tool to supplement income. The group confirmed that tax-free childcare is used but didn't feel it was making much of an impact.

CF commented that she has different charges across the different age groups, and asked if she could charge a consumable charge. EW advised that top-up charges were not permitted and that all children who are eligible for the entitlement should be treated the same. Charges could be made for additional services above and beyond the basic childcare. EE commented that they treat running the business as a whole and charge all the parents enabling them to provide a service to all.

EW advised she had attended a DfE conference the previous week where there was an item on running a business. A delegate pointed out that the only advice on the DfE website was directing people to Ofsted; no other advice from central government was provided on running a business. LAB suggested that perhaps this area needed to be looked at in the future, as private equity firms have bought an increasing number of private nursery chains.

KV commented that she must pay VAT as a private business, whereas charities are exempt. People, when told, are astounded nurseries are not exempt from paying VAT. LAB advised it is the same with business rates.

Any further feedback on the draft Provider Agreement is to be sent to JH by Tuesday 26 March in order for it to be issued to early years providers ahead of the Easter break.

ACTION: Provider Agreement feedback to JH by 26 March 2024

9. Ofsted Big Ask (LAB)

LAB advised this consultation being carried out by Ofsted is seeking views across all areas around inspections. It closes on 31 May 2024 and LAB asked providers to share it with parents. The new head of Ofsted doesn't have any EY experience so wants feedback.

ACTION: None

10. AOB

MT advised that the DfE have awarded £106,955 to Wiltshire Council to help with qualified teachers. A payment of £545.69 per qualified teacher (based on data submitted by providers for the 2024 EY Census) will be made to settings to help with pay and pensions of relevant staff. EE commented that she has 3 QTS and queried whether they would get the funding? If 3 qualified teachers were included on the EY Census return, then funding will be awarded. This includes QTS, EYPS and EYTS.

Family Hubs start on 2 April 2024, and children's centres will be closing across the county next Thursday. Children's centres have done a brilliant job over the last 20 years, but it's now time to move forwards. Spurgeon's will be linking in with all early years providers, schools and communities. There will be a soft launch initially at County Hall, Monkton Park, and Five Rivers.

MT asked if physical spaces in the hubs will be live on 2 April, which LAB confirmed. LAB advised that acoustic walling to divide some of the large spaces will be arriving later. CF queried if this included health visitors as well. LAB confirmed that Hub and Health Visitor contracts both start on 2 April 2024 to ensure earlier help is available. If there are any issues with health visitors, then please inform LAB. HVs, let us know.

ACTION: None

11. Date of next meeting

The next meeting is scheduled for Friday 7th June 11-12.30pm

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**Early Years Reference Group Meeting
Friday 7 June 2024**

1. Welcome and introductions

Lyssy Bolton (LB), Lucy-Anne Bryant (LAB) (Chair), Emma Cooke (EC), Jenny Harvey (JH) (notes), Kirsty Merrifield (KMe), Debbie Muir (DM), Kai Muxlow (KM), Emily Wood (EW), Ben Stephens (BS)

2. Apologies

Lucy Bracher (LB), Jackie Day (JD), Emma Egan (EE), Charlotte Forester (CF), Lisa Fryer (LF), Sarah Hawkins (SH), Julia Honeywell (JHo), Emma Osmund (EO), Margaret Ritson (MR), Marie Taylor (MT), Karen Venner (KV)

3. Safety Valve Arrangement

Our guest speaker, Ben Stevens, Inclusion, SEND and AP Transformation Lead, gave a presentation to the group on the SEND Transformation plan (Safety Valve Arrangement). A copy of the presentation is attached.

One of the key drivers for the Safety Valve Arrangement is the high deficit in the high needs block. Wiltshire Council needed to find out and understand why there has been significant growth in this block. There has been a sizable increase in the number of EHCP's in the younger age cohort (early years). Wiltshire Council needs to reflect on inappropriate EHCP referrals and placements and whether there are alternatives to EHCP for these children. In some cases, Family Support might be a more appropriate route, and the service is looking at advertising these more to increase awareness of the alternatives.

BS confirmed that if Wiltshire Council were able to reduce the deficit to £137.3 million, central government have agreed to pay £67 million towards the total, with Wiltshire Council paying the remaining £70.3 million.

DM commented that since Inclusion Support Funding (ISF) changed, it is more accessible to EY settings. It has had a huge impact in her setting and thanked EC and her team. LAB stated that ISF investment at the right time is making a difference, and DM and her setting is an example of this.

KMe queried the 2 new roles in EC's team. EC confirmed the roles were Early Years Pathway Navigators who will be focusing on pre-EHCP children, looking at what other routes could be sought before going down the EHCP route.

LB raised the issue of access to additional professionals and multi-disciplinary approaches and routes. LB also mentioned the Bristol evidence-based training model and changing pedagogy. The Hanen Program for early childhood educators is called 'Learning Language and Loving it' and is being offered by Bristol & Beyond Stronger Practice Hub ([LEARNING LANGUAGE, \(A4 Poster\) \(beyth.co.uk\)](https://www.beyth.co.uk)). There is an event on 4th July 2024.

DM queried whether there were any plans to deliver further BLAST training. EC confirmed that there was a large rollout of this training a while ago. Retraining is approximately £20 per person so is affordable and accessible for settings to pay themselves.

There was a discussion on how this important information could be shared with the sector. EW suggested a communications package including a presentation recording could be put together with further periodic updates. LAB suggested an article about the Safety Valve Arrangement in the EY newsletter, and EC suggested inviting BS to the next Early Years Managers meeting.

**ACTION: EC to invite BS to the next Early Years Manager meeting
LAB to include an article on the Safety Valve Arrangement in the next Early Years Newsletter**

4. Minutes of last meeting (22 March 2024)

The minutes were agreed as a true record.

ACTION: None

5. Matters arising (MT)

Item 5 – Completed

Item 6 – Capital funding expansion. LAB apologised for not sending the criteria to LB; this will be done.

Item 6 – Capital funding expansion. LAB will provide LB with additional information on the Forest area.

Item 8 – Local Provider Agreement. JH confirmed member feedback received was fed into the Agreement, which was then issued to the sector just ahead of the Easter break.

ACTION: LAB to deal with Capital funding expansion items

6. Budget Monitoring

In the absence of MT, JH shared a Finance Update report produced by MT with the group. A copy of the report is attached.

The outturn for the Early Years block 2023/24 showed an underspend of £1.162million. The DfE will shortly do a post-year adjustment which will recover some of this figure. The outturn position for Revenue Monitoring 2023/24 showed a deficit of 452 in the number of PTE children taking up the Early Years Entitlement. This is the main driver of the underspend and is due to a drop in the birth rate. The largest age cohort affected is the three/four year olds.

Both LB and DM left the meeting at approximately 11.45am

KMe queried the low birth rate mentioned for the drop in the number of children taking up early years entitlement. Her setting is currently full. However, she has noticed that they usually have several traveller families attending, and they have had none in the last 2 years. They don't appear to be accessing early years as in previous years.

KMe also commented that her setting has seen an upwards trajectory in home and flexi schooling. For the past 4 or 5 years, children have been attending the setting, then moving into homeschooling. Now unusually, more children are being home schooled before attending the setting.

KMe has had conversations with several traveller families, and they are moving around more than before due to the uncertainty of finding and keeping a site for their home. They are also experiencing issues as to whether to enrol their child in pre-school/school; the current economic situation is also affecting this community. EC commented that The Lookout Day Nursery usually have a few home schoolers, and it would be interesting to see if they are experiencing the same situation.

ACTION: LAB and EC to liaise with Wiltshire Council officers about traveller families and home schooling

7. Early Years Entitlement Expansion

LAB confirmed that several funding applications have been received, and currently 8 providers are being funded. KMe queried the total number of applications received and where the successful applicants were located. LAB confirmed 20 applications had been received, and the successful applicants were located across the county.

The main criteria to access this funding are:

- the setting is located in an area of low sufficiency
- is judged as either good or outstanding by Ofsted, and
- financial provider contribution included.

If agreed, the setting is expected to contribute at least 50% towards the development of places.

LAB shared the Occupancy Summer 2024 slide (copy attached). Pressure is showing as building in Bradford-on-Avon, Devizes, and Pewsey for under 2s but the local authority isn't currently seeing this as being problematic. However, there is high demand in all areas of the county for 3&4 year olds which is a concern. A new setting will shortly be opening in Limpley Stoke which should slightly ease the pressure in Bradford on Avon (low availability for all age groups). There will also be 2 new settings in Melksham.

There are a further 4 weeks within which providers can submit applications.

KMe suggested that providers are possibly waiting and watching to see if demand does come before committing funds. LAB stated that some settings have 50 families on their waiting list, and its these who need to develop and expand their provision.

LAB confirmed that staffing is a huge issue and looking at staffed places as available places gives a false picture. EW mooted the idea of a golden handshake rather than capital funding being made available to providers, but LAB confirmed that capital funding couldn't be converted to revenue.

KMe said that her setting supports students from the local colleges (Hampshire and Wiltshire). She has heard that unfortunately students are leaving their courses and training as the college courses are awful. In one instance, a teacher had gone on maternity leave, and the replacement teachers coming in had neither Early Years knowledge nor experience. LAB stated that it would be preferable if the colleges approached the sector and asked for assistance rather than risk student disengagement. The local authority needs to liaise with local Wiltshire colleges and neighbouring authority colleges to find out more information and address the issue.

KMe suggested guest speakers from local early years providers could go into the colleges and present what it is really like to work in a setting. KMe did recognise that not all settings would be able to support a student. EW queried whether the education model needed to change, i.e. a move away from college courses towards apprenticeships.

LAB stated that all EYRG members are keen to push Early Years as a career and champion it, and that working with good practitioners would encourage students to remain in the sector.

EW asked if Wiltshire Council could fund providers going into colleges and teaching and offering their practical knowledge and experience.

ACTION: EC and LAB to speak with Lisa Cuffy (Wiltshire College) about rejuvenating EY courses

8. Wrap around childcare development (LAB/All)

LAB confirmed there were 2269 responses to the wrap around childcare survey, and 55 responding parents said they wanted/needed wraparound care that was currently not offered.

61 schools didn't respond to the survey, and it's been found that some schools did not forward the survey onto their parents. EW confirmed that the survey link was added to Right Choice, emailed directly to all schools, and was placed in the Early Years Newsletter.

ACTION: None

9. Child Health Records Red Book

LAB asked KMe if red books were ever asked for in her setting. KMe confirmed not really and that they were viewed as rather pointless now. 75% of red books have weight inputs and 1st set of vaccines noted, but nothing else. Two years prior to Covid, there would have been notes in them and it was viewed as a more worthwhile document. Previously, they would have been chased if not provided, but not now. KMe confirmed that health visitors are not using them as they are being encouraged to go down the electronic route.

LAB and EC commented that different behaviour is being employed by different health visitors in different areas around the county. The Health Visitor service has signed up to the 10 Cultural Commitments around collaborative working. Hopefully with the new contract now in place, change will happen in time.

ACTION: EC/LAB to raise issues with Sally Johnson

10. SENIF update

EC gave a brief update on SENIF. Tighter control and management of the fund continues. When it was taken over by EC, it was found that incorrect levels of funding had been awarded. As increasing numbers of referrals are being received, questions are being asked as to why funding is needed and could there be alternative routes to support the child and setting. Now, Band 1 referrals are increasing, whilst Band 2 referrals are decreasing.

ACTION: None

11. Chair position

LAB confirmed that a provider voice was needed from this group at Schools Forum. Tasks include agenda setting, attending Schools Forum, representing EYRG to councillors where letters are required. EW confirmed an induction and support is available.

KMe stated that this group is still not known to all providers. EW suggested an article be added to an upcoming Early Years Newsletter.

All agreed, that in the absence of many members at the meeting, the nomination could be delayed until the next scheduled meeting.

**ACTION: LAB/JH to add an article about EYRG to the EY Newsletter.
JH to email all members again about the chair position ahead of the September meeting**

12. AOB

No other business for discussion.

ACTION: None

13. Date of next meeting

The next meeting is scheduled for Friday 27th September 9.30am-11am.

DEDICATED SCHOOLS BUDGET – BUDGET MONITORING 2023/24

Purpose of the Report

1. To present budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2023-24 as at 31st March 2024.

Main Considerations

2. Appendix 1, 2 & 3 to this report outline the budget monitoring summary as at 31st March 2024 including activity information for demand driven budgets.
3. All figures in this report are provisional.
4. The outturn variance of £3.645 million against the overall schools budget is an improvement since the quarter 3 report of £0.741m. The main driver for this adverse variance is the on-going pressures on the high needs block, the reasons for these are known and understood.
5. As the local authority must make arrangements to finance this pressure, some expenditure in the Schools Budget is ultimately financed from the DSG reserve. The drawdown upon this reserve since 2018 has created a deficit reserve position. In acknowledgement of deficits held by local authorities, which are estimated at £2.6bn nationally, the government introduced a three-year statutory override in 2020 which separates local authorities' DSG deficits from their wider financial position, this has now been extended until 2026.
6. Wiltshire's planned transfer from the DSG reserve is based on the previous forecast of expenditure to 31st July 2024 and is estimated at £16.648million. The overspend of £3.645 million on the grant plus this transfer from reserves mean the overall estimated DSG pressure is therefore £20.293m.
7. Table 1 below shows the variances by individual DSG block.

Table 1 DSG Block Summary

	DSG Allocation from the DfE £m	Wiltshire Transfers £m	Current Annual Budget £m	Outturn £m	Outturn Variance £m	% Variance
Early Years Block	32.563	0.180	32.135	30.972	(1.162)	-4%
Schools Block	346.293	(1.717)	344.577	344.359	(0.218)	0%
High Needs block	70.798	1.797	91.492	96.683	5.190	6%
Central Block	2.600	(0.260)	2.340	2.175	(0.166)	-7%
Overall	452.254	0.000	470.544	474.188	3.645	1%
Planned transfer from DSG reserve (overspend)					16.648	
Net in year movement to the DSG reserve					20.293	

Early Years Budgets (Budget £32.135M, variance (1.162M))

8. The early years budgets are underspent by £1.162m. For this financial year, the budgets have been decreased by the planned transfer to the DSG reserve. For early years this is £2.250m. This was to facilitate improved budget monitoring and should reflect the DfE's post year adjustment of the variance. The variance is due to actual childrens attendance and therefore payments, being less than those calculated by the DfE using the updated census data.
9. The DfE have now adjusted the early years allocations as follows:
- a. Post year adjustment to 2022/23 financial year – an uplift of £35,133
 - b. In year adjustment (2023/24 financial year) – an uplift of £77,322
10. Table 2 below shows the take up in PTE (part time equivalent) children which reflects the financial variances.

Table 2 - Early Years Learners

	Budgeted	Actual	Forecast PTE Variance	Budgeted Spend	Forecast Spend	Forecast Spend Variance
	PTE	PTE	PTE	£M	£M	£M
3- & 4-year olds	9,873	9,491	-382	26.336	25.526	(0.810)
2-year-olds	664	722	58	2.178	2.223	0.045
ISF	308	289	-19	0.99	0.884	(0.106)
	hours	hours	hours			

*PTE = part time equivalent learners

11. The local authority has a duty of sufficiency in this sector and is working closely with providers to support through these challenging times of rising costs and a highly competitive recruitment marketplace. There is a paper later in the agenda updating Members around the DfE driven national changes to early years and wraparound provision and our progress in this area.

Schools Budgets (Budget £344.577M, variance (£0.218M))

12. The underspend on schools relates to vacancies due to staff turnover and recruitment timings in central teams and is helping to offset the overall pressure on the DSG.

High Needs Budgets (Budget £91.492M, variance £5.190M)

13. The High Needs budgets are overspent by £5.190m. For this financial year, the budgets have been increased by the planned drawdown from the DSG reserve. For high needs this is £18.898m. This was to facilitate improved budget monitoring, setting targets and measuring success in recovery planning.
14. The major driver of the increased cost is volume. Activity (volume) is measured in FTE – full time equivalent pupils. Full variance analysis is provided at Appendix 2. It is important to note that the number of EHCPS being requested continues to increase post pandemic.

Table 3 - Number of EHCP Learners

	Children with an EHCP in Wiltshire (2022-23)	Prior Year Data (2021-22)	Prior Year Data (2021-22)
As at 31 March	5,696	4,907	4,346
Annual movement	789	561	253
% Movement	13.9%	11.4%	6%

COVID

15. The pressure has significantly increased with September placements confirmed as well as assessments and decisions being made which reduce the backlog. The majority of placements are in our own schools and therefore growth is in our own special and mainstream provision has increased by 806 fte since 2022/23 financial year. There has been particular pressure on the named pupil allowances which support children in mainstream settings. Additionally, there are 122 fte more pupils in post 16 education and 43 fte more in independent provision than in the 2022/23 financial year.
16. Unit costs in school have risen during the year, and this is perhaps reflected in high numbers of re-banding requests. Subsequently unit costs of the various top ups have risen except for primary. The paper Review of EHCP Top-Up Funding – Key Principles - later in the agenda will seek views of the Forum on the proposed review in this area.
17. We have been able to respond to the increasing demand with DfE capital grant to increase primary resource base provision; two new pilot secondary resource bases and the new 150 place free school; SAIL. These developments have had and will continue to have a positive impact on expenditure levels however, with the significant overall growth this is less visible. We know that where independent school fees are avoided, local community education for learners and lower cost for the local authority are achieved.
18. Full detail on all activity data including average unit costs can be found at Appendix 2 and 3, highlights of the demand in FTE are included in table 4a and b overleaf.

Table 4a - High Needs Learners activity

	Budgeted Volume FTE	Actual Volume FTE	Volume variance FTE	% change in volume	Actual unit rate
Wiltshire School Provision					
Special School Places	910.75	910.75	0	0%	£10,000
Special School Top Ups	1,041.05	1,020.29	(21)	-2%	£13,198
ELP Places	294.83	294.83	0	0%	£6,000
ELP Top Ups	623.82	581.32	(43)	-7%	£5,204
Resource Base Places	413.28	413.28	0	0%	£6,000
Resource Base Top Ups	636.11	536.08	(100)	-16%	£7,244
Named Pupil Allowance - Prim	813.97	1,024.78	211	26%	£6,040
Named Pupil Allowance - Sec	541.48	557.51	16	3%	£0
Transition Support Funding	313.25	233.71	(80)	-25%	£4,000
Independent / External Provision					
Independent Special School Fee	302.27	301.78	(0)	0%	£67,145
6th Form	688.76	665.88	(23)	-3%	£12,125
Wiltshire College Places	386.33	386.33	0	0%	£6,000
Inter Authority Recoupment	248.84	266.09	17	7%	£16,088
Alternative Provision & DP (SEN	501.20	672.95	172	34%	£13,779

Table 4b - High Needs Learners price variance

	Budgeted Price Per annum	Actual Price (Ave) Per annum	Price variance Per annum	% change in price
Wiltshire School Provision				
Special School Places	10,000	10,000	0	0%
Special School Top Ups	11,850	13,198	1,348	11%
ELP Places	6,000	6,000	0	0%
ELP Top Ups	5,163	5,204	41	1%
Resource Base Places	6,000	6,000	0	0%
Resource Base Top Ups	5,999	7,347	1,348	22%
Secondary Resource Base Top l	0	6,040	0	0%
Named Pupil Allowance - Prim	6,496	6,203	(293)	-5%
Named Pupil Allowance - Sec	5,406	5,166	(240)	-4%
Transition Support Funding	4,000	4,000	0	0%
Independent / External Provision				
Independent Special School Fee	57,478	67,144	9,666	17%
6th Form	11,053	12,125	1,072	10%
Wiltshire College Places	6,000	6,000	0	0%
Inter Authority Recoupment	13,777	16,088	2,311	17%
Alternative Provision & DP (SEN	13,236	13,779	543	4%

19. As Schools Forum are aware, work is on-going to investigate and address the issues. The Placement Strategy has expanded places however managing demand remains challenging. Reports later in the agenda form part of the SEN and AP strategic recovery plan.

Central School Services Budgets (Budget £2.340m, variance (£0.166m))

20. The small underspend in this area is a combination of an underspend on central services and an underspend in admissions due to appeals panel income.

DSG Reserve

21. The deficit reserve brought forward of £35.249 million is decreased by the positive early years block adjustment of £0.035 million. The planned drawdown of £16.648m and overspend of £3.644m will take the reserve into a deficit position of £55.506 million, slight improvement on our Safety Valve agreement, noted below.

22. The first payment from the DfE in relation to Safety Valve has been received and this reduces the deficit reserve to £28.706m.

Table 5 - DSG Reserve

	Total 23/24 FY £m	For Info: Safety Valve Agreement £m
Balance Brought Forward from 22/23	35.249	35.249
Early Years Adjustment (prior year)	(0.035)	(0.035)
Planned drawdown from reserve	16.648	16.648
Actual Variance 23/24	3.644	4.385
	55.506	56.247
Safety Valve DSG Payment	(26.800)	(26.800)
Deficit C/F after SV Payments	28.706	29.447

DSG Management Plan

23. Every Local Authority in England that has a deficit against their high needs block is required to hold a DSG Management Plan and the financial summary of the Wiltshire plan has been reported to Schools Forum on a regular basis.

24. The purpose of the plan is to demonstrate how the deficit in the high needs block will be reduced. As part of the Safety Valve Programme the council will need to be able to demonstrate that it can achieve in year financial balance by the end of the plan period.

25. The Safety Valve DSG plan will be shared as an appendix to the SEND Transformation Update Report.

Proposals

26. Schools Forum is asked to note the provisional outturn budget monitoring position including the balance on the DSG reserve at the end of March 2024 together with the reports later in the agenda on the SEND Transformation Programme.

Report Author: Marie Taylor,

Head of Finance, Children & Education

Tel: 01225 712539

e-mail: marie.taylor@wiltshire.gov.uk

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Appendix 1 – Schools Budget Forecast Position as at 31st March 2024 - Provisional Outturn

a	b	c	d = (c-b)	e = (d/b)	f	d = (c-b)	g
Service Area	Current Annual Budget	Period 13 Spend	Provisional Outturn Variance	Variance	22/23 Outturn	February forecast variance	Movement from Previous Report
	£m	£m	£m	%		£m	
Three to Four Year Olds EY Entitlement Funding	26.336	25.526	(0.810)	-3.07%	24.877	(1.022)	0.213
Two Year Olds EY Entitlement Funding	2.178	2.223	0.045	2.08%	2.508	0.000	0.045
Supplementary Funding	1.642	1.506	(0.136)	-8.30%	0.000	(0.169)	0.033
Early Years Inclusion Support Fund	0.990	0.884	(0.106)	-10.74%	0.760	(0.106)	0.000
Early Years Pupil Premium & DAF	0.359	0.364	0.005	1.42%	0.350	(0.012)	0.017
Early Years Central Expenditure	0.630	0.469	(0.161)	-25.49%	0.407	(0.159)	-0.002
Early Years Block	32.135	30.972	-1.162	-3.62%	28.901	-1.468	0.305
Schools Budget Shares Primary & Secondary - Local Authority Schools	112.023	112.023	0.000	0.00%	111.575	0.000	0.000
Schools Budget Shares Primary & Secondary - Academy Schools	229.554	229.554	0.000	0.00%	212.179	0.000	0.000
De-delegated services incl education functions (maintained schools only)	2.467	2.277	(0.189)	-7.68%	1.916	(0.131)	-0.058
Delegated & De Delegated Total	344.044	343.855	-0.189	-0.06%	325.669	-0.131	-0.058
Growth Fund	0.533	0.504	(0.028)	-5.29%	0.076	0.000	-0.028
Schools Block	344.577	344.359	-0.218	-0.06%	325.745	-0.131	-0.087
Special School Place Funding	9.108	9.108	0.000	0.00%	8.337	0.000	0.000
Resource Base (RB) Funding	2.480	2.480	0.000	0.00%	1.975	0.000	0.000
Enhanced Learning Provision (ELP) Funding	1.769	1.769	0.000	0.00%	1.793	0.000	0.000
High Needs Block Place funding (all schools)	13.356	13.356	0.000	0.00%	12.105	0.000	0.000
Named Pupil Allowances (NPA)	8.215	9.237	1.022	12.44%	7.626	1.433	-0.411
Special School Top-Up	12.337	13.466	1.129	9.15%	10.578	1.203	-0.073
Resourced Base (RB) Top-Up	3.816	3.883	0.067	1.76%	3.377	(0.400)	0.467
Enhanced Learning Provision (ELP) Top-Up	3.221	3.025	(0.195)	-6.07%	2.686	(0.153)	-0.042
Transitional Support (TSP) payments	1.253	0.935	(0.318)	-25.39%	1.126	(0.182)	-0.136
Secondary Alternative Provision Funding	3.011	2.535	(0.476)	-15.80%	2.674	0.000	-0.476
Non Wiltshire Pupils in Wiltshire Schools	0.000	-0.031	(0.031)	0.00%	0.055	0.000	-0.031
Devolved to Maintained & Top Ups (all schools)	31.852	33.051	1.199	3.76%	28.122	1.901	-0.702
Wiltshire College Places	2.318	2.318	0.000	0.00%	2.118	0.000	0.000
Wiltshire Pupils in Non Wiltshire Schools	3.428	4.281	0.853	24.87%	3.338	0.827	0.026
Post-16 Top-Up	7.613	8.073	0.461	6.05%	6.620	0.631	-0.170
Independent & Non-Maintained Special Schools	17.374	20.263	2.889	16.63%	15.888	2.975	-0.086
SEN Alternative Provision, Direct Payments & Elective Home Education	6.634	9.273	2.639	39.78%	6.113	1.575	1.063
Education Other than at School (EOTAS)	0.519	0.414	(0.105)	-20.29%	0.338	(0.154)	0.049
Funding for Places outside Schools	37.886	44.622	6.736	17.78%	34.416	5.854	0.882
High Needs in Early Years Provision	0.819	0.510	(0.308)	-37.67%	0.428	(0.310)	0.002
Speech & Language	0.764	0.560	(0.205)	-26.80%	0.560	(0.204)	-0.000
Support for AP, SEN & Inclusion	6.815	4.584	(2.231)	-32.73%	4.220	(2.059)	-0.172
Commissioned AP & SEN Support Services	8.398	5.654	-2.744	-32.67%	5.208	-2.574	-0.170
High Needs Block	91.492	96.683	5.190	5.67%	79.850	5.180	0.010
Section A - Central Licences	0.457	0.457	0.000	0.00%	0.409	0.000	0.000
Section B - Central Provision (Former ESG, Admissions, Schools Forum)	1.648	1.585	-0.063	-3.79%	1.385	-0.092	0.030
Central Provision within Schools Budget	2.105	2.042	-0.063	-2.97%	1.794	-0.092	0.030
Section C - Education Services to CLA, Child Protection in Schools & Early Years & Prudential Borrowing	0.235	0.132	-0.103	-43.81%	0.257	-0.083	-0.020
Historic Commitments	0.235	0.132	-0.103	-43.81%	0.257	-0.083	-0.020
Central School Services	2.340	2.175	-0.166	-7.07%	2.051	-0.175	0.010
PLANNED DRAWDOWN FROM DSG RESERVE AT YEAR END	-16.648	-16.648	0.000	0.00%		0.000	
Total Schools Budget	453.896	457.540	3.645	0.80%	436.548	3.406	0.238

Appendix 1 - the service forecasts of expenditure as at 31st March 2024 - 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 31st March 2024- this is a measure of volumes of pupil placements / support arrangements

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Appendix 2 - Activity Variance Analysis

<i>h</i>	<i>i</i>	<i>j</i>	$k = (j-i)$	$l = (k/i)$	<i>m</i>	<i>n</i>	<i>o</i>	<i>n</i>	<i>o</i>
	Budgeted Activity	Period 13 Activity	Period 13 Variance		22/23 Outturn Volume	Volume movement from Previous Report	2023/24 Average Prices	22/23 Average Prices	Unit
Volume analysis	FTE	FTE	FTE	%					
Three/Four Year Olds	9,873	9,491	(382)	-4%	9,721	80	£4.68	£4.42	p/hr
Two Year Olds	664	722	58	9%	828	15	£5.75	£5.69	p/hr
Supplementary Funding	1,315	1,206	(109)	-8%	0	26	£1.10	n/a	p/hr
ISF	308	289	(19)	-6%	0	(0)	£3,059	£3,213	per child
							£828	£615	pa
Early Years Block ACTIVITY DRIVER DATASET							£0.53	£0.53	p/hr
	12,160	11,708	(452)	-4%	10,549	121			
High Needs Block Activity Driver Dataset									
Sp Sch Place Funding	911	911	0	0%	806	(0)	£10,000	£10,000	pa
RB Funding	413	413	0	0%	329	0	£6,000	£6,000	pa
ELP Funding	295	295	0	0%	315	(0)	£6,000	£6,000	pa
	1,619	1,619	0	0%	1,449	(0)			
NPA	1,355	1,582	227	17%	1,215	(24)	£5,838	£5,889	pa
Special School Top-Up	1,041	1,020	(21)	-2%	872	(5)	£13,198	£11,394	pa
RB Top-Up	636	536	(100)	-16%	383	28	£7,244	£10,257	pa
ELP Top-Up	624	581	(43)	-7%	444	(1)	£5,204	£4,964	pa
Temporary Support Payments	313	234	(80)	0%	95	(34)	£4,000	£2,755	pa
	3,970	3,954	-16	0%	3,009	(35)	£8,359	£8,029	
Wiltshire College Places	386	386	0	0%	350	0	£6,000	£6,000	pa
Non Wiltshire Schools	249	266	17	7%	216	(17)	£16,088	£13,419	pa
Post-16 Top-Up	689	666	(23)	-3%	544	(28)	£12,125	£10,783	pa
Ind & Non-Maint Sp Sch	302	302	(0)	0%	259	(14)	£67,145	£56,075	pa
SEN AP, DP & EHE	501	673	172	34%	197	59	£13,779	£12,914	pa
	2,127	2,293	166	8%	1,566	(0)	£19,460	£17,448	

SS, ELP & RB places above those agreed with the DfE are costed to top ups

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Analysis of Price & Volume Variance as at March 2024													Appendix 3	
	Budgeted Volume FTE	Projected Volume	Volume variance	% change in volume	Budgeted unit rate	Budgeted £	Variance	Projected £	Actual Unit rate	Unit Rate Variance	Variance	% change in rate	Total Variance	
Wiltshire School Provision														
Special School Places	910.75	910.75	0.00	0.0%	10,000	9,107,500	-	9,107,500	10,000	0	-	0.0%	-	
Special School Top Ups	1041.05	1020.29	-20.76	-2.0%	11,850	12,336,500	246,041	13,465,759	13,198	1,348	1,375,300	11.4%	1,129,259	
Special Schs Top Ups Total Expenditure	1041.05	1020.29	-20.76			12,336,500		13,465,759					1,129,259	
ELP Places	294.83	294.83	0.00	0.0%	6,000	1,769,000	-	1,769,000	6,000	0	-	0.0%	-	
ELP Top Ups	623.82	581.32	-42.50	-6.8%	5,163	3,220,800	219,448	3,025,434	5,204	41	24,082	0.8%	- 195,366	
ELP Top Ups Total Expenditure	623.82	581.32	-42.50			3,220,800		3,025,434					- 195,366	
Resource Base Places	413.28	413.28	0.00	0.0%	6,000	2,479,667	-	2,479,667	6,000	0	-	0.0%	-	
Resource Base Top Ups	636.11	493.58	-142.52	-22.4%	5,999	3,816,000	854,997	3,626,595	7,347	1,348	665,592	22.5%	- 189,405	
RB Top Ups Total Expenditure	636.11	493.58	-142.52			3,816,000		3,626,595					- 189,405	
Secondary Resource Base Top Ups	0.00	42.50	42.50	0	0	0	-	256,714	6,040	6,040	256,714	0.0%	256,714	
Secondary RB Top Ups Total Expenditure	0.00	42.50	42.50	0.00	0.00	0.00	0.00	256,714		6,040			256,714	
Named Pupil Allowance - Prim	813.97	1024.78	210.81	25.9%	6,496	5,287,568	1,369,399	6,356,634	6,203	-293	300,333	-4.5%	1,069,066	
Named Pupil Allowance - Sec	541.48	557.51	16.03	3.0%	5,406	2,927,232	86,645	2,880,328	5,166	-240	133,549	-4.4%	- 46,904	
NPA Total Expenditure	1355.45	1582.29	226.83			8,214,800		9,236,962					1,022,162	
Transition Support Funding	313.25	233.71	-79.54	-25.4%	4,000	1,253,000	318,178	934,836	4,000	0	13	0.0%	- 318,164	
Independent / External Provision														
Independent Special School Fees	302.27	301.78	-0.49	-0.2%	57,478	17,373,800	28,042	20,262,775	67,144	9,666	2,917,017	16.8%	2,888,975	
ISS Expenditure	302.27	301.78	-0.49			17,373,800		20,262,775					2,888,975	
6th Form	688.76	665.88	-22.88	-3.3%	11,053	7,612,900	252,947	8,073,499	12,125	1,072	713,546	9.7%	460,599	
6th Form Expenditure	688.76	665.88	-22.88			7,612,900		8,073,499					460,599	
Wiltshire College Places	386.33	386.33	0.00	0.0%	6,000	2,318,000	-	2,318,000	6,000	0	-	0.0%	-	
Inter Authority Recoupment	248.84	266.09	17.25	6.9%	13,777	3,428,200	237,713	4,280,779	16,088	2,311	614,866	16.8%	852,579	
Inter Authority Recoupment Expenditure	248.84	266.09	17.25			3,428,200		4,280,779					852,579	
Alternative Provision & DP (SEN)	501.20	672.95	171.75	34.3%	13,236	6,633,900	2,273,241	9,272,744	13,779	543	365,603	4.1%	2,638,844	
Total Expenditure	7715.95	7865.58	149.63	1.9%		79,564,067	2,047,346	88,110,264			6,498,850		8,546,197	

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Wiltshire Council

Schools Forum

27 June 2024

SEND Transformation Update

Purpose of the Report

1. To update Schools Forum on the SEND Transformation Programme.

Background

2. The SEND transformation programme brings together all the changes we're progressing in SEND in Wiltshire.
3. The programme will include:
 - a. The new SEND, Inclusion and AP Strategy (2024 – 2029).
 - b. The existing SEND and Inclusion Strategy until that ends later this year.
 - c. The High Needs Sustainability Plan and Safety Valve agreement which sets out how we will improve outcomes while reducing our deficit.
 - d. Any changes that need to be made following external inspection or review.
4. The most important aim of the programme is to improve outcomes for children and young people with SEND in Wiltshire. We believe that through improved outcomes, especially by shifting resource 'up stream', we can meet our other primary driver: financial sustainability.
5. This report focuses on the High Needs Sustainability Plan and Safety Valve agreement.

The Safety Valve Agreement

6. Safety Valve is a DfE programme to support councils that have a financial challenge with their High Needs Block. The invitation to join Safety Valve was received in July 2023.
7. The High Needs Block Sustainability Plan for Wiltshire has been developed with stakeholders to identify improvements in our SEND system that will create better support for children and young people and their families, while addressing the financial challenges.
8. That plan was submitted to DfE in January with endorsement from Wiltshire Schools Forum, Children's Select Committee, and a cross-sector board including membership from Wiltshire Parent Carers Council (WPCC) and the Integrated Care Board (ICB).
9. Since the last Schools Forum, the Safety Valve agreement has been signed and the programme team have begun to implement the workstreams which will deliver the change required. The published agreement can be found on the DfE website: [Dedicated schools grant: very high deficit intervention - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/dedicated-schools-grant-very-high-deficit-intervention)

10. As reported in January, at the end of the plan period, the cumulative mitigated deficit is forecast to be £137.2m. In March, it was reported that Wiltshire Council would likely have to contribute £70-90m. Now that the agreement has been signed it confirms that the expectation is that the DfE will contribute a total of £67m to the reduction of the deficit and therefore the Council will need to contribute £70.2m from general fund sources to completely remove the deficit.
11. The first DfE payment of £26.8m was received in March 2024 and has been utilised to reduce the cumulative deficit at the end of the 2023/24 financial year.
12. If the council successfully meets the deal criteria faster than expected, then the council contribution could reduce however, if the council fails to meet the deal criteria then this figure will go up, and could lead to the DfE suspending future Safety Valve funding.
13. The council approved the creation of an earmarked reserve as part of the budget and will be taking an approach of maximising all opportunities to set money aside to fund the contribution required.
14. Appendix 1 shows the summary table from the Council's DSG Management Plan which supports the Safety Valve Plan.

Programme Update – June 2024

15. Recruitment to the programme team has been successful. A project manager and programme support officer have already started and are delivering significant pieces of work. The final two project managers are starting at the end of July, so that they are fully inducted and ready to fully support the programme in the new academic year.
16. Overall, the programme is RAG rated Green, and the financial projections are RAG rated Green.
17. This status is a reflection of the work that has begun to address all the pressure points in Wiltshire SEND system. Efforts have primarily been focussed on developing the support offer for Schools in the new academic year and reviewing internal decision-making processes. These areas are most likely to deliver meaningful impact in the short to medium term.
18. The DSG outturn for 2023/24 indicates that the Council is within the terms of the agreement for that year. The financial position for 2024/25 is rated as green as whilst there are pressures in the budget we are at an early stage in the project and therefore able to implement any mitigating actions that may be required at this stage.
19. As noted in paragraph 3, the Safety Valve agreement, the new SEND and AP Strategy, and the Sustainability Plan are being brought together into a single SEND Transformation plan. This is broken down into 6 priority programme areas:
 - Voice of the child and their family
 - Improving support, skills and practice
 - Right support at the right time
 - Preparation for adulthood

- Financial assurance in our SEND system
- Improving communication, processes and culture

20. Two programme areas within SEND Transformation are RAG rated amber:

- Right support at the right time – amber due to concerns about the delivery of new special school places and delays in announcements of capital funding.
- Preparation for adulthood – amber due to delivery plans still being in draft.

21. One area for further investigation is around the EHCP numbers. The number of EHCPs in the system currently is growing faster than was anticipated. Work has been undertaken to rule out a number of potential causes for this growth, including a statistical error. It does appear that the growth is real, and a reflection of stronger demand than expected in the forecast.

22. At this time, this is not a cause for concern as the interventions in the sustainability plan are not yet having an impact. This was anticipated in the modelling, however, steps are being taken to ensure that senior officers are sighted on the monitoring data on a weekly basis, and further analysis is being undertaken to ensure that there is a full understanding of where system pressure is coming from.

23. The council is still waiting to hear about the capital request of £5.7m that was submitted to bring forward the provision of special school places in the south of the county. The DfE requested more information about the bid in May, which was supplied. However, given this is a ministerial decision, the current expectation is that the authority is unlikely to hear back until after the UK General Election on 4th July, and probably not until September 2024 at the earliest.

What Changes will Schools See on the Ground?

24. The early priorities in the plan have been to focus on developing the support offer for Schools in the new academic year and reviewing internal decision-making processes. Schools will start to see changes in the following areas:

Domain	Impact
Policy & Governance	<ul style="list-style-type: none"> Local Authority will be firmer on application of the national SEND Code of Practice to ensure that this statutory code is being delivered as expected. This will include increased scrutiny of the support offered and the PDR cycles delivered before statutory support is requested. Increased focus on delivery of Ordinarily Available Provision for all Learners (OAPL) and support to ensure it is being delivered in every school.
Finances	<ul style="list-style-type: none"> Significantly increased investment in early help and inclusion services to enable the development of more rounded support to schools. More teams working directly with schools, and a more proactive approach to that support. Continued delivery of more specialist places across special schools and resource bases. Emphasis on 'right support, first time' leading to fewer inappropriate placements in settings while awaiting special school placement. Less reliance on independent special schools. Banding values reviewed and processes streamlined to try and ensure schools have what they need to support children with SEND and improve predictability in funding.
Intervention and Support	<ul style="list-style-type: none"> LA will expect a "warm welcome" for all children with SEN and their families and will proactively challenge schools where this does not appear to be happening, especially around transition points. More children with SEN will be supported in mainstream schools, and the LA will work with schools to ensure that high-quality inclusive practice is being delivered. LA will increase facilitation and commissioning of outreach from Special Schools to support better inclusive practice SEND early help advice and guidance line being set up for schools to seek support, strategies and social care input where appropriate in the early stages of need.
Training and Professional Development	<ul style="list-style-type: none"> SEND and Inclusion training for schools made free to help us all build our collective system of excellence. This was strongly requested by schools and reflects the increased value being placed on upskilling across our whole system. Peer support and continuing professional development opportunities facilitated and encouraged by the LA. Including revitalised networks for SENCOs to support each other and share best practice.
Assessment and Identification	<ul style="list-style-type: none"> Improvements to the way schools monitor progress through the assessment process so that they are kept abreast of developments through a "Customer Relationship Manager" type portal. LA will clear the assessment backlog and, by lowering referral numbers, will free up time for Educational Psychologists to do more preventative or early support work in schools. Increased emphasis from the LA in supporting schools to identify need early and put preventative or early support strategies in place to reduce the need for statutory support.
Collaboration and	<ul style="list-style-type: none"> LA will continue to facilitate and expect closer working relationships between schools and with other partners so the SEND 'system' is

Partnership Working	<p>strengthened. Renewed efforts to create the right culture in our system, where there is a sense of shared endeavour and shared values.</p> <ul style="list-style-type: none"> • Invigorated System of Excellence approach will offer opportunities for peer support and accountability, but also direct influence over the transformation programme. • Co-designed “Inclusion Charter” setting out what the LA, parent carers and schools should expect from each other as an agreed plan which we are all accountable for delivering. • The LA will back schools where they want to try something ‘different’ or ‘innovative’ to support children and young people with SEND. • Greater emphasis on peer support, and on schools holding each other accountable for delivery of good quality mainstream inclusion.
Parent and Carer Engagement	<ul style="list-style-type: none"> • Schools will have greater clarity from parent carers on what is important to them and their children. • LA will need support from schools in having the right conversations with parent carers about the options for their child.

25. We are working to ensure that significant elements of transformation programme are in place before the start of the new school year.

26. This will include:

	Impact	Rationale
SEND Early Help, Advice and Guidance Line	Schools and SENCOs can access guidance more quickly, especially where early support, outside of statutory support, might provide better outcomes for the children and the school.	Early identification of SEN can mean there is an opportunity for prevention and early help. We want to enable easy access to these approaches and strategies.
Free SEND and inclusion training	Schools are more able to access the training they need for their staff, improving mainstream inclusion.	Schools told us that one of their biggest concerns about delivering more mainstream inclusion was lack of training and experience in their staff. We want to accelerate the improvements in this area.
Autism Accreditation Pathway	Schools can access training and accreditation that improves support for children with autism.	Autistic Spectrum Condition remains the biggest primary need for children with SEN and so we will support schools with strategies and approaches.
NHS programme of training in neurodiversity (PINS)	The programme will work directly with 20 schools in Wiltshire to develop the school's capacity to support neurodiverse pupils.	The NHS is offering this programme to local authorities, and we want to ensure schools are given the tools they need to support a range of neurodiversity.
Inclusion Advisors working in schools	Inclusion advisors will work directly in schools providing advice, especially around the delivery of OAPL, supporting the delivery of high-quality inclusive practice.	Schools tell us that they want more 'hands-on' advice on delivering inclusive practice in the classroom. These Inclusion Advisors will provide this expertise.
SEND good practice networks	SENCOs will be further supported to meet collaboratively to share best practice and for peer support, advice and review.	Peer support was flagged by schools as something that they would really welcome to support better practice. Expanded SENCO networks, meeting 3 times a year as an authority, and 3 times a year as a locality will provide this.
SEND Portal	An online portal that provides a better interface during the ECHNA process. This will allow schools to see where applications are without the need for multiple emails.	All our stakeholders, including schools, had comments about the complexity and opacity of the SEND process. This portal should offer a greater level of transparency, process display, reminders about annual reviews etc.

Proposal

27. It is proposed that Schools Forum note the update on the High Needs Sustainability Plan and the proposed changes to be implemented for the new school year.

Report Authors:

Liz Williams, Finance Lead – High Needs Sustainability

e-mail liz.williams@wiltshire.gov.uk

Ben Stevens, Inclusion, SEND & AP Transformation Lead ben.stevens@wiltshire.gov.uk

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Executive Summary

Summary of end of year positions

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Planned DSG position (surplus)/deficit	£10,812	£18,907	£25,409	£35,214	£56,247	£84,527	£113,081	£132,796	£137,561	£137,267	£137,267
In year net position deficit / (surplus)											
Schools block	-£218,085	-£2,837,284	-£945,068	-£1,220,601	-£65,683	£0	£0	£0	£0	£0	£0
Central schools services block	-£262,973	-£67,651	£169,731	-£292,731	-£150,532	£0	£0	£0	£0	£0	£0
Early years block	£542,741	-£505,787	-£2,445,638	-£2,180,601	-£3,254,194	£0	£0	£0	£0	£0	£0
High needs block	£8,470,047	£11,505,753	£9,722,968	£13,499,064	£24,503,903	£28,279,577	£28,554,532	£19,714,767	£4,764,666	-£293,461	£0
Total net	£8,531,730	£8,095,031	£6,501,993	£9,805,131	£21,033,494	£28,279,577	£28,554,532	£19,714,767	£4,764,666	-£293,461	£0
Other											
Council contribution (negative)	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Add brought forward deficit / (surplus) (net)	£2,279,880	£10,811,610	£18,906,641	£25,408,634	£35,213,765	£56,247,259	£84,526,836	£113,081,369	£132,796,136	£137,560,802	£137,267,340
Planned year end position	£10,811,610	£18,906,641	£25,408,634	£35,213,765	£56,247,259	£84,526,836	£113,081,369	£132,796,136	£137,560,802	£137,267,340	£137,267,340

Headline Mitigations/Savings

Page 6 Key Mitigations/Savings	Mitigations/ Savings	Mitigations/ Savings	Mitigations/ Savings	Mitigations/ Savings forecast	Mitigations/ Savings forecast	Mitigations/ Savings forecast	Mitigations/ Savings forecast	Mitigations/ Savings forecast	Mitigations/ Savings forecast	Mitigations/ Savings forecast	Mitigations/ Savings forecast
	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
1											
2 Workstream 1						£0	-£770,140	-£756,840	-£4,764,700	-£9,129,611	-£14,108,308
3 Workstream 2						£0	£1,560,745	£5,241,553	-£1,434,039	-£14,943,010	-£19,381,301
4 Workstream 3						£0	-£978,843	-£1,256,121	-£1,538,807	-£1,807,129	-£2,176,868
5 Workstream 4						£0	£0	-£536,167	-£1,072,333	-£1,858,500	-£2,144,667
6 Workstream 5						£0	£0	-£183,522	-£428,804	-£1,001,130	-£1,655,217
7											
8											
9											
10											
Balancing item to help reconcile - misc											
Total savings	£0	£0	£0	£0	£0	£0	-£188,238	£2,508,904	-£9,238,684	-£28,739,380	-£39,466,361

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Wiltshire Council

Schools Forum

27 June 2024

Annual Schools Consultation – Transfer of funding from Schools Block to High Needs Block 2025/26

Purpose of report

1. To brief Schools Forum on the consultation questions, and supporting information, to be sent out to all schools in the autumn of 2024 on the principles and value of any block transfer from schools block to high needs block in the 2025/26 financial year.

Background

2. Whilst the schools block is ring-fenced in line with the DSG conditions of grant, local authorities can transfer up to and including 0.5% of their schools block funding into another block, with the approval of their Schools Forum. Where a local authority wishes to transfer more than 0.5% of their schools block funding into another block, and/or where agreement has not been reached with Schools Forum, the local authority must submit a disapplication request to the Secretary of State.
3. In Wiltshire a transfer of funding from the schools block to the high needs block has historically been agreed each year, where this has been affordable within the 'cash envelope' for school funding and the NFF has been applied. In 2024/25 a transfer of £2m, or 0.55%, from the schools block to the high needs block was agreed by Schools Forum and confirmed by the Secretary of State following the submission of a disapplication request. This was in line with the proposals in the High Needs Sustainability Plan.
4. The high needs block overspend in Wiltshire has continued to increase since 2018/19 and the cumulative deficit at the end of the 2023/24 financial year is £55.506m prior to any Safety Valve payments from the DfE (£28.706m after accounting for Safety Valve payments made in 2023/24). The deficit is expected to increase by a further £28.3m in the 2024/25 financial year.
5. The deficit is supported by a High Needs Sustainability Plan and a Safety Valve agreement is in place with the DfE. Within that plan the council commits to eliminating the in-year deficit on high needs spend by the end of the 2028/29 financial year. The Safety Valve agreement includes a clear condition on the maximum level of deficit allowable in any financial year and the plan includes proposed investment from the high needs block, the council and a transfer from the schools block.
6. As previously reported to Schools Forum, the High Needs Sustainability Plan prioritises investment in early support for schools and families and includes an

assumption that a transfer of 1% will be made from the schools block into the high needs block for the next 4 financial years, starting from 2025/26. Whilst this is built into the agreed plan it is recognised that this must be the subject of an annual consultation with schools and Schools Forum, and an annual disapplication request to the Secretary of State. It is also recognised that this is in the context of an increasingly difficult financial environment for schools.

Consultation with Schools

7. It is proposed to issue a consultation with mainstream schools in the autumn term to enable views to be sought on the level of block transfer from schools block to the high needs block.
8. In previous years Schools Forum has applied a principle to any block transfer decision that the value of the transfer should not impact on the agreed NFF values for schools. It is expected that a transfer of 1% would impact on NFF levels allocated to schools and therefore the consultation for 2025/26 will need to model the potential impact of this. It is proposed that any adjustment to NFF factors will be modelled against AWPU values.
9. Appendix 1 outlines an initial proposal for the consultation questions for schools.
10. The information to accompany the consultation could include the following, and the views of Schools Forum are sought on anything further that needs to be included.
 - a) Total investment in mainstream inclusion within the plan
 - b) Other support for mainstream schools that would be enabled via the block transfer.
 - c) Impact on overall sustainability plan if the 1% transfer is not agreed.
 - d) Impact on NFF values if a transfer of 1% is agreed.
 - e) Impact on individual schools of the reduced NFF values.

Proposals

11. That Schools Forum confirms the consultation questions and supporting information for all schools around a block transfer from schools block to high needs block in the 2025/26 financial year.

Report authors:

Grant Davis, Schools Strategic Financial Support Manager
01225 718587

grant.davis@wiltshire.gov.uk

Liz Williams, Finance Lead – High Needs Sustainability Programme

liz.williams@wiltshire.gov.uk

Appendix 1 –2025/26 Schools Consultation:

Background

- *The high needs block overspend in Wiltshire has continued to increase since 2018/19 and the cumulative deficit at the end of the 2023/24 financial year is £55.506m prior to any Safety Valve payments from the DfE (£28.706m after accounting for Safety Valve payments made in 2023/24). The deficit is expected to increase by a further £28.3m in the 2024/25 financial year.*
- *The deficit is supported by a High Needs Sustainability Plan and a Safety Valve agreement is in place with the DfE. Within that plan the council commits to eliminating the in-year deficit on high needs spend by the end of the 2028/29 financial year. The Safety Valve agreement includes a clear condition on the maximum level of deficit allowable in any financial year and the plan includes investment from the high needs block, the council and a transfer from the schools block.*
- *The High Needs Sustainability Plan prioritises investment in early support for schools and families and includes an assumption that a transfer of 1% will be made from the schools block into the high needs block for the next 4 financial years, starting from 2025/26. Whilst this is built into the agreed plan it is recognised that this must be the subject of an annual consultation with schools and Schools Forum*

The DSG is ringfenced and therefore to manage this overspend, it is suggested an amount is transferred from the Schools Block to the High Needs Block as in the previous 4 years.

The information that accompanies this consultation details the investment included in the High Needs Sustainability Plan to support mainstream schools and potential impact on schools of the proposed block transfer values.

Q1 a) Taking the factors above into account, do you support a transfer of funding from the School Block to the High Needs Block, where it can be afforded within the overall ‘cash envelope’ for schools funding and application of the National Funding Formula?

Yes	
No	

If you have answered “yes” please answer question 1(b)

If you have answered “no” please answer question 1(c)

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

Value to Transfer	Avg. £/Pupil	Please select
£2.0m (0.55%)	£31.15	
£2.7m (0.75%)	£42.14	
£3.0m (0.83%)	£46.72	
£3.6m (1.0%)	£56.19	

c) No transfer of funding from the Schools Block to the High Needs Block for 2025/26.

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

Confirm NOT to transfer funds	
-------------------------------	--

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

Yes	
No	

2) If you do not agree to the transfer of funds or the reduction of top-up funding levels, do you have any further suggestions to enable the delivery of the proposals in the High Needs Sustainability Plan?

Wiltshire Council

Schools Forum

27 June 2024

Allocation of Funding Growth in Specialist Places

Purpose of the Report

1. To seek agreement on the methodology for allocating funding for the growth in places in Wiltshire specialist provision from the high needs block.

Background

2. Wiltshire currently operates a growth fund within the Schools Block to fund mainstream schools for pupil growth. This is in line with National Funding Formula (NFF) criteria and is used to:
 - support growth in pre-16 pupil numbers to meet basic need
 - support additional classes needed to meet the infant class size regulation
 - meet the revenue cost of new schools
3. The NFF criteria for supporting pupil growth do not extend to the expansion of places within provision funded from the High Needs Block. As part of the High Needs Sustainability Plan, Wiltshire Council is delivering significant numbers of additional places across its special schools as well as developing new Resource Base provision.
4. Currently when an expansion of specialist provision is agreed, or a new school/resource base developed, funding is put in place from the date at which the places are opened (usually the start of the academic year). It is recognised that there is a cost to the schools of recruiting and training staff in advance of new classes being opened and that this is not currently reflected in the funding model.

Main Considerations

5. It is proposed that a mechanism for supporting the significant planned growth in specialist places is put in place. Any “growth fund” for specialist places would need to be funded from the High Needs Block.
6. In the first instance Schools Forum is asked to agree a growth fund mechanism for the expansion of existing special schools and development of new special schools. The principles of any growth funding mechanism should be that funding is proportionate, predictable and applied on a formulaic basis in line with agreed criteria.
7. Schools Forum is also asked to agree that similar principles should be applied to the development of new resource base places however further work is required to finalise a methodology for resource bases in line with the principles outlined above.

Proposed Criteria

8. The proposed criteria for funding pupil growth for the expansion and development of new special school places are as follows:
- 1) Growth funding will be applied to new places being delivered as part of the Specialist SEND Place Strategy. Growth funding will not be applied to ad hoc increases in places or where a school agrees to support an additional child over the planned place number – these increases will be managed as per the current processes.
 - 2) Place funding will be applied one term in advance of the places opening. For example, if new places are to come on stream from September in any given year, place funding will commence from April. This would enable an additional 5/12ths of place funding to be utilised to support recruitment of staff, staff training, etc
 - 3) Payments will be based on the increase in planned place number agreed with the LA.
9. The principle of agreed growth fund criteria will replace any individual school level discussions in relation to “pump priming” funding.

Financial Implications

10. In the current financial year it is estimated that the cost of the proposed growth fund for special schools will be £650,000 based on planned delivery of new places.

School	Places		Difference	Growth Fund £
	Sep-23	Sep-24		
Springfield	210	250	40	166,667
Downland	90	90	0	0
Exeter House	177	210	33	137,500
Silverwood	460	510	50	208,333
SAIL	82	115	33	137,500
			156	650,000

11. This is provided for within the special school top-up budget for the 2024/25 financial year and excludes any new places covered by a separate SLA. In 2023/24 £0.499m was paid in one off “pump priming” payments to expanding special schools. Based on the numbers of new places the spend under the proposed formula would be in line with the previous year.

Proposal

12. It is proposed that:
- a) Schools Forum approve the principle that advanced funding should be allocated to support expansion of specialist places.
 - b) Schools Forum approve the criteria for allocating growth funding for the planned increase in special school places.
 - c) Schools Forum agree the principle of applying a similar approach for the development of new resource base places and agree that proposed criteria should be drawn up.

Report Author: Liz Williams, Finance Lead – High Needs Sustainability
Tel: 01225 712521 e-mail liz.williams@wiltshire.gov.uk

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Wiltshire Council

Schools Forum Finance & SEN Working Group 17 June 2024

Schools Forum 27 June 2024

Annual Schools Consultation

- *De-Delegation of Central Expenditure 2025-26*
- *De-Delegation for School Improvement Functions 2025-26*

Purpose of report

1. To brief Schools Forum and agree a set of questions to be sent out to all schools in the Autumn of 2024.

Background - De-Delegation of Central Expenditure

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

6. There are a number of outcomes that could flow from the proposals to delegate the budgets. These include:
 - a. Following consultation, maintained schools agree that budgets should be de-delegated and retained centrally by the LA with services provided to all maintained schools
 - b. Schools agree that budgets should be delegated, and schools make/purchase their own provision as appropriate
 - c. Schools agree that budgets should be delegated, and they then cluster together to purchase or deliver services.
7. Under scenario (a) the LA would be able to retain a level of service to provide to maintained schools, gaining from the economies of scale through this arrangement. The size of the service may need to be scaled back over time as the number of maintained schools convert to academies. *(at the time of this report there 103 maintained primary and secondary schools)*
8. Under scenarios b and c, the LA would not be able to continue to deliver a service unless there is sufficient buy back on a traded basis from schools (maintained or academy) to enable retention of sufficient staff. This will be difficult to predict, and the LA will need to decide whether it can afford to continue to deliver services centrally on a fully traded basis with full cost recovery. This would require a risk assessment.
9. **Appendix 1** to this report lists the consultation questions.

De-Delegation for School Improvement Functions

10. The DfE have removed the Local Authority Monitoring and Brokering Grant (LAMB) in full, from the 2023-24 year. Local authorities do have the opportunity to fund improvement services through either de-delegation or on a traded basis.
11. A local consultation exercise was undertaken in advance of the 2024-25 year to determine whether maintained schools would elect to de-delegate funding from their budgets to support the loss in the LAMB grant.
12. The annual grant had stood at £459,000 in the 2021-22 year and was reduced by 50% in 2022-23 and fully removed in 2023-24. In 2022-23, maintained schools de-delegated funding of £9.39 per pupil, in 2023-24, this was £19.63 per pupil and in 2024-25, this was £21.08 per pupil.
13. The new Head of the School Improvement team has been working with Primary and Secondary school leaders regarding the delivery of the service, in order to understand the most appropriate route to fulfil their needs.

Proposals

14. That Schools Forum decide on the consultation questions for maintained schools around delegation/de-delegation of budgets for central services and School Improvement within the schools' block. Appendix 1 & 2.

Report author:
Grant Davis, Schools Strategic Financial Support Manager
01225 718587
grant.davis@wiltshire.gov.uk

Appendix 1 – De-Delegation Questions

If you would prefer to that these services are provided centrally through de-delegation from your school budget, please place a tick in the De-Delegate box.

If however, you'd prefer to have the funding in your budget and procure your own services, please place a tick in the Don't Delegate box

DfE Heading	Wiltshire Budget	Don't Delegate?	De-Delegate?
Free school meals eligibility	Free School Meals Eligibility Service		
Licences/subscriptions	Access Budget Licence		
Staff costs – supply cover	Trade Union Duties		
	Maternity Costs		
Support for minority ethnic pupils and underachieving groups	Ethnic Minority Achievement Service (EMAS)		
	Traveller Education Service		
Behaviour support services	Primary Behaviour Support Service		

Appendix 2 – De-delegation for School Improvement Functions Questions

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 100% rate for the 2024-25 year)

<u>Options</u>	<u>Impact in School Effectiveness</u>	<u>Cost to Schools</u>	<u>Amount per pupil</u>	<u>Rank</u>
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	£11.13	
Schools fund 75% of LAMB	Reduction in Services - £114,8k	£344,250	£16.70	
Schools fund 87.5% of LAMB	Reduction in Services - £57.3k	£401,625	£19.48	
Schools fund 100% of LAMB	Existing service maintained	£459,000	£22.27	

Amount per pupil to be updated based upon maintained pupil numbers – June 2024

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Wiltshire Council

Schools Forum

27 June 2024

Wraparound Childcare Guidance

[Wraparound childcare: guidance for schools and trusts in England
\(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

Requests for Wraparound Childcare

[Responding to requests for wraparound childcare - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

Early Years Careers

[Do something big - Early Years Careers](#)

Purpose of the Report

1. This report considers the new legislation around early years and wraparound care.

Main Considerations

Early Years Entitlement Expansion

2. In the spring budget of 2023, the Chancellor announced that funded childcare hours would be extended to children of eligible working parents in England from nine months old to support increased parental engagement in the labour market.
3. The measures announced will expand the existing system by offering up to 30 funded hours of childcare per week over 38 weeks of the year to children aged nine months and over whose parents meet the same income eligibility criteria as applied to the existing 30 hours entitlement for three and four-year-olds. The policy will have a phased rollout, with 15 hours per week for 38 weeks a year offered to eligible two-year-olds from April 2024 and to eligible children under two from September 2024. The new entitlement will be offered in full of September 2025.
4. New entitlements were introduced in April 2024. Funding is available through an eligibility code from DWP. Wiltshire has validated 2454 out of 2593 issued – 94.6%.
5. There are currently 222 settings with spaces for two year olds across county and these have 68% occupancy.
6. The DfE has allocated capital funding of £885,466 to Wiltshire to expand childcare provision to enable an increased number of two year olds and under to access funding.

7. Twenty providers have expressed an interest in expanding their provision. To date £342,338 in funding has been agreed for seven settings and these settings will make contributions of £342,018 towards the cost of the agreed developments.
8. Funding has been agreed to develop new places in existing provision in the following areas:

Community Area	No. of places created under 2s	No. of places created 2 year olds	Extra places 3&4 years olds	Total number of paces
Melksham	12	4	2	18
Calne	21	0	0	21
Westbury	16	13	0	29
South West Wiltshire	3	3	0	6
Chippenham	6	4	0	10
Amesbury	6	4	0	10
South West Wiltshire	18	0	0	18
Total	82	28	2	112

9. More bids are being assessed and there is a need for additional spaces in Devizes and Pewsey.
10. There is still an issue around recruitment and retention of staff. The DfE has developed a recruitment campaign [Do something big - Early Years Careers](#) which includes a national free job site for vacancies.

Wraparound Childcare

11. The government's ambition is that by 2026, all parents and carers of primary school-aged children who need it will be able to access term time childcare in their local area from 8am-6pm, so that parents can access employment and improve labour market participation.
12. This is parent paid provision with no learning and development requirements. There are no qualification requirements for staff, however they must have a DBS and safeguarding training and first aid training and adhere to welfare and safeguarding legislation.
13. A plan for delivery has been developed which has involved supply and demand mapping.
14. A survey to understand the demand for wraparound childcare received 2269 responses. Of which 55% (n.1249) said that lack of childcare was preventing all parents/ carers in a household from working the hours that they would wish to work. 9% of respondents require before and after school care until 6pm.
15. 61 schools did not have any responses and most schools had under 50% of parents respond.
16. Currently there are 393 providers – schools, independent, childminders offering 1990 places.

17. The DfE has allocated capital funding of £221,366 and programme funding of £3.3m over two years.
18. The programme funding aims to remove barriers to setting up new provision or expanding current provision, including removing the financial risk of setting up new provision when demand is not guaranteed. It is based on a 'pump prime' model. There is a desire from the DfE to test 'over-supply' models whereby significant additional demand needs to be built before it can be sustainable.
19. Schools can request funding for a provision onsite through an Expression of Interest form available from childcareexpansion@wiltshire.gov.uk
20. Guidance is available for schools to understand how to respond to requests from parents for wraparound care and providers requesting to offer care on a school site.
21. All provision should be running and sustainable by September 2026.
22. There should be robust governance through a governing board which is inclusive of delivery partners and key stakeholders, as well as Schools Forum.
23. The governing board will hold officers to account, decide on the allocation of funding and will also monitor and review the implementation of the delivery plan. They will ensure that priorities are shared and understood, and that all parties encourage and challenge each other to deliver positive outcomes.
24. The governing board will meet six times a year over the two years of the programme funding.
25. Currently the governing board consists of wraparound care providers and officers. It is necessary to have representation from schools, those running and not running onsite provision to offer a varied and diverse perspective.

Proposal

26. Schools Forum is asked to recommend the best way to secure representatives to the governing board.

Report Author: Lucy-Anne Bryant

Commissioning Manager

Tel: 01225 718068

e-mail: lucy-anne.bryant@wiltshire.gov.uk

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