

Schools Forum

MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 21 JANUARY 2021 AT ONLINE MEETING.

Present:

Neil Baker (Chairman), Nikki Barnett, Aileen Bates, Andy Bridewell, Rebecca Carson, Michele Chilcott, Sam Churchill, John Hawkins, Cllr Ross Henning, Mel Jacob, Georgina Keily-Theobald, Lisa Percy (Vice-Chair), John Proctor, Giles Pugh, Nigel Roper, Graham Shore, Trudy Srawley, Ian Tucker, David Whewell, Catriona Williamson and Lynn Yendle

Also Present:

Jane Davies (Portfolio Holder, Education and SEND), Grant Davis (Schools Strategic Financial Support Manager), Helean Hughes (Director – Education and Skills), Lisa Pullin (Democratic Services Officer), Marie Taylor (Head of Finance – Children and Education)

1 Apologies and Changes of Membership

Apologies were received from Mark Cawley (Early Years representative).

Apologies were also received from the following Wiltshire Council Officers: Helen Jones (Director – Commissioning), Cllr Laura Mayes (Cabinet Member for Children, Education & Skills), Simon Thomas (FACT Programme Lead) and Lucy Townsend (Interim Corporate Director – People).

The Chair welcomed Ian Tucker from St John's School in Marlborough who is one of the new Co-Chairs of WASSH (with George Keily-Theobald, Downland School) and he replaces Fergus Stewart on Schools Forum.

2 Minutes of the Previous Meeting

The minutes of the previous meeting held on 10 December 2020 were approved subject to the following minor amendment being made at minute number 49, the 4th bullet point to read as follows:

There were also some projects currently in the scoping phase – Transport, Easy Early Support front doors and Multi-agency use of the Case Management System; and

Resolved:

That the Chairman approve and sign the minutes of the meeting of Schools forum held on 10 December 2020 subject to the minor amendment as detailed above.

3 **Chairman's Announcements**

The Chair made the following announcements:

Review of Membership

On 20 January 2021, Grant Davis carried out a review of the proportion and membership of Schools Forum, looking at the proportions following the census and conversions which have taken place since the last review in October 2020. In terms of Primary representatives, there were currently have 4 maintained and 2 academy representatives.

Based upon the latest proportions, which are now showing that we should have 3.47 maintained reps and 2.53 academy reps, a change in the membership breakdown is needed.

The Chair proposed that this change come into effect from September 2021 when the annual review of membership is usually carried out. The Clerk agreed to liaise with Catriona Williamson (Chair of Primary Heads Forum) to ensure that an additional primary academy representative is sought, and one maintained primary representative will relinquish a place in time for the meeting on 7 October 2021.

Comfort break

It was agreed that a brief comfort break would be held around 3pm.

4 **Declaration of Interests**

There were no interests declared.

5 **Public Participation**

No questions or statements had been received prior to the meeting.

6 **Updates from Working Groups**

The Forum noted the update received by way of the minutes of the meeting of the School Funding and SEN working group held on 11 January 2021.

The Forum noted the update received by way of the minutes of the meeting of the Early Years Reference Group meeting held on 12 January 2021.

An early years representative thanked Marie Taylor for the immense amount of work put into the preparation and modelling for the Early Years Reference Group meeting.

There were no questions raised from the notes of the meetings.

Resolved:

That Schools Forum note the minutes of the joint meeting of the School Funding and SEN working group held on 11 January 2021 and the Early Years Reference group meeting held on 12 January 2021.

7 Dedicated Schools Budget - Budget Monitoring 2020-21

Marie Taylor (Head of Finance – Children and Education) referred to the budget monitoring report as at 31 December 2020 that was circulated with the Agenda.

Marie highlighted the following:

- There was no significant change from the blocks since the last report up to October 2020;
- The overall forecast overspend was £9.123 million against the overall dedicated schools' grant budget. The main driver for the forecast variance was the ongoing pressures of the high needs block;
- The pandemic had created much uncertainty around early years and no variance was forecast on the budgets for the free entitlement for 15 and 30 hours childcare for 2, 3 & 4 year olds however, this would depend on the outcome of the October census, consultation with the sector representatives, increased numbers of children returning to childcare, and children becoming eligible and the DfE's post financial year adjustment which, could be negative if the January 2021 census numbers fall;
- There is good news in that a separate COVID grant has been received by the local authority (COMF grant) to support, facilitate and aid containment of the virus. An amount of £1.0 million had been earmarked to allocate to providers under certain criteria;
- The forecast underspend on schools block largely related to the school's growth fund which was currently showing an underspend and was helping to offset the overall pressure on the DSG;
- The high needs budgets were projected to overspend by £11.556 million. When the level of funding available does not match the local needs, the budget cannot be set at the required level but, can only be set at the available funding level which creates an imbalance. No one budget can be set at an achievable level and so the location of the overspend is not an indication of individual budget issues but that the whole block is under significant pressure;
- The major driver of the increased cost is volume, however it is important to note that the number of EHCP's being requested has slowed slightly –

this could be due to reduced face to face contact with pupils due to Covid or it could be that we have reached a plateau; and

- With the deficit reserve brought forward in 2019-20 of £11.350 million minus the positive early years block adjustment of £0.539 million this would take the forecast overspend to an overall deficit position of £19.933 million. Wiltshire was not alone in this and although there was a High Needs Working Group looking at ways to make savings it was more of a struggle to keep this project going during Covid.

An early years representative asked Marie to reword paragraph 16 in the report to clarify that whilst there was a positive early years block adjustment this would go towards reducing the negative reserve.

Resolved:

That Schools Forum note the budget monitoring position at the end of December 2020.

8 School Budget Setting 2021-22

8a School Revenue Funding 2021-22 - Funding Settlement and Budget Setting Process

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on the revenue funding settlement and the budget setting process for 2021/22. Grant highlighted the following:

- The DfE had issued the revenue funding settlement for schools on 17 December 2020;
- In the Autumn of 2019, the Government announced its pledge to boost schools and high needs funding over a 3-year period - £2.6 billion in 2020-21, - £4.8 billion in 2021-22 (increase by £2.2bn) and £7.1 billion in 2022-23 (increase by £2.3bn. In addition, a further £700 million was pledged for high needs nationally in 2020-21 and a further £730 million for 2021-22;
- The DfE have continued to allocate school funding on the basis of the NFF which should see all schools benefitting from the additional funding. The 2021-22 year is another “soft” year with Schools Forum still retaining its role in determining the school funding allocation methodology;
- The introduction of mandatory minimum per pupil funding levels for the 2020-21 year have been continued and the rates have increased for the 2021-22 year to £4,180 for Primary and £5,415 for Secondary. These figures incorporate and include the teachers’ pay and pension grants will cease at end of 20-2021 year – this means that these two grants will be baselined into schools’ core funding at a value of £14.179m for 2021-22;

- It was a surprise to hear from the DfE that the numbers of eligible Pupil Premium Grant funding pupils would be taken from the October 2020 census and not the January 2021 census;
- The provisional Dedicated Schools Grant (DSG) allocation for Wiltshire was £406.342 million which was an increase of £31.839m compared with 2020-21;
- The overall uplift in 'real' funding for comparative purposes is 4.47%, split as Schools - 3.55%, Central – -0.98%, High Needs – 9.68%, Early Years – 4.96%;
- Included within the Schools Block funding of £317.724m is the amount of £1.814m allocated on the basis of pupil growth within Wiltshire;
- The DfE have stipulated that the funding awarded through the Teachers Pay and Pension elements must be excluded when considering any transfers between the Schools' Block and other Blocks. Therefore, any transfer would be based upon the Net Funding figure of £303.545 million, not the Total funding figure of £317.724 million;
- There had been an uplift in funding for all of the blocks except for the central schools' services block;
- Included within the Wiltshire allocation is £0.805m for the Teachers Pay and Pension funding for Special Schools and High Needs settings. This has been equated to an uplift of £660 per place to be added to the current funding in Special Schools;
- The DfE continue with their commitment to reviewing the High Needs NFF and a consultation is proposed with the initial changes expected to be reflected in 2022-23. The review will cover all factors of the High Needs NFF including the 'Historic Spend' factor and also the weightings applied to each factor. Schools Forum members will be asked to respond to the consultation when it has been issued and circulated;
- The funding regulations do allow for a transfer of funding between the schools' block and other blocks within the DSG of up to 0.5% with the agreement of Schools Forum (this had been previously agreed);
- Local Authorities were required to submit their proposed delegated budget for schools in their areas by 21 January 2021 (today) to the DfE who would then confirm the formula is compliant with the funding regulations. The DfE will then confirm the budgets to academies with the LA also needing to notify maintained schools of their budget shares by the end of February 2021; and

- It had been agreed by the maintained schools' representatives at the December meeting of Schools Forum that the de-delegation of services would continue in 2021-22.

An early years representative reported that he felt that in paragraph 17 of the report to state that early years had an increase of 4.96% was misleading. Whilst it was an increase on the previous year's funding, over the last 4 years there had been no increase for pay and pension and that their funding was in fact decreasing. Grant Davis responded this figure had been included for comparative purposes across all of the blocks and that early years would change over the year as it was not fixed like the other blocks.

Resolved:

That Schools Forum note the report.

8b Central School Services Block Update 2021-22

Marie Taylor (Head of Finance – Children and Education) referred to the report which sought to update Schools Forum on issues relating to the central schools block budget for 2021-22 and the decisions that would need to be made as part of the budget setting process. Marie highlighted the following:

- The budget proposal for the central schools services block was approved in principle at the December meeting of the Forum and the only change since that was the actual charge for copyright licences has been which had now been received from the DfE and it was higher than our estimate and comes in at £0.395 million; and
- Assuming the proposed budget is accepted by the Forum, an amount of £0.192m unallocated CSSB is estimated to be available to transfer to fund high needs pressures.

Resolved:

- 1. That Schools Forum note the change to the copyright licence cost for 21-22 and reduction in the contribution to the high needs block in the report and the required decisions to the central school's block budget for 2021-22 later in the meeting when all information had been received.**
- 2. That Schools Forum note that the notification of the school improvement monitoring and brokering grant has not yet been shared by the DfE. If the grant ceases or is significantly reduced, the expenditure plan will need to be reviewed and decisions would need to be reconsidered at the next available Schools Forum meeting.**

8c High Needs Block Update 2021-22

Marie Taylor (Head of Finance – Children and Education) referred to her report which sought to update Schools Forum on issues related to the high needs block and the decisions that would need to be made as part of the budget setting process for 2021-22. Marie highlighted the following:

- The budget proposal for the high needs block was approved in principle at the December meeting of the Forum and the only changes since this are the now confirmed planned places for September 2021 and the DSG management plan (contained in Agenda supplement (1));
- The high need block allocation is £57.529 million (which is an uplift of £5.5 million – 10.66% on 2020-21). Looking at the current pressures there is £10.144 million that needs to be covered to meet current spend levels, £1.811 million which is the best estimate of planned placements and the top ups needed to support these placements, £4.716 million which is the estimated cost increase based on planned reduced EHCP rate of increase for 2021-22, £0.348 million for estimated contract inflation at 2%. £2.260 million of savings has been identified as per the high needs block recovery plan, leaving an estimated cost pressure for 2021-22 of £14.606 million;
- It is not possible to fully fund the pressures above from within the high needs block. In order to partially fund the pressures on the high needs block, there could be a transfer of the surplus from the central block (£0.192 million) a transfer of 0.5% from the schools' block (£1.5 million). However, this would still mean a funding shortfall which would be similar for other local authorities; and
- The current forecast overspend on the School Funding reserve is £19.898 million. This is currently being cash flowed by the local authority. This level of deficit has triggered the requirement to submit a DSG Management Plan to the DfE. This has been completed by the High Needs Recovery Group and will be encompassed into the governance and sign off alongside the Council's budget and Schools Budget for 21-22 by Members at Council at the February meeting.

The Chair reported the DSG Management Plan was considered by the joint meeting of the School Funding and SEN Working Group and they had made some suggestions to add to the Plan. The consultation on high needs funding was welcomed and it was suggested that Schools Forum with the assistance of the Officers do all they can to ensure that the other stakeholder groups are given the opportunity to respond to the consultation.

Schools Forum were consulted and confirmed their support for the proposals detailed below.

Resolved:

1. That Schools Forum note the pressures on the high needs block for 2021-22 and the potential options to reduce the shortfall against high needs budgets including agreeing a transfer from Schools Block to balance the high needs pressures. *(This decision was made later in the meeting under Agenda item 9)*

That Schools Forum approve the draft DSG Management Plan for presenting to Cabinet and submission to the DfE.

8d Early Years Update 2021-22 (Indicative Allocations)

Marie Taylor (Head of Finance – Children and Education) referred to the report which sought to update Schools Forum on issues related to the Early Years block for 2021-22 and the decisions that would need to be made as part of the budget setting process. Marie highlighted the following:

- In his 2020 Spending Review, the Chancellor announced that there would be £44 million nationally for early years education in 2021-22 to increase the hourly rate paid to childcare providers for the government's free hours offers. The provisional early years block settlement for Wiltshire for 2021-22 was £28.217 million and of this sum, £0.265 million related to the increased hourly rates;
- At the moment, the indicative allocations would mean an increase of 8p per hour for 2-year-old funding (to £5.48 per hour) and 6p for 3 to 4-year-old funding (£4.25 per hour);
- The operational guidance for early years entitlements: local authority funding of providers 2021-22 was published in December 2020 and this contained a number of key points for the local authority to include when they were funding their providers;
- Consultation had been carried out with Schools Forum early years representatives (John Proctor and Mark Cawley) prior to the meeting of the Early Years Reference Group meeting as well as at the meeting itself where they had considered modelling of what the allocation would mean for early years and the hourly rates. Appendix 1 to the report showed options of the hourly rates and the % of the contingency unallocated (to be used for any increased take up of hours);
- Option 1 shown maximises the 2-year-old funding and passports the increase in full. The guidance previously protected 2-year-old funding however, this has been relaxed. To do this, the 3&4-year-old rate needs to be £4.25 in order to leave a contingency for any increased take up of hours. Option 6 shows that in order to increase the 3&4-year-old rate by 1p per hour, the hourly rate for 2-year olds would need to be £5.42. The steer from the Early Years Reference Group was that the 2-year-old vulnerable children rates needed to be protected and so option 1 was the preferred option;

- Appendices 2 and 3 to the report showed the calculations of compliance with a worked example showing 98.2% of pass through;
- The Disability Access Fund is payable as a lump sum once a year per eligible child. If a child is splitting their entitlement between two or more providers, then parents should be asked to nominate the main setting. If a child receiving DAF moves from one setting to another within a financial year the new setting is not eligible to receive DAF for this child within the same financial year. There was no change in the allocated funding rate for 2021-22.

The Chair asked if the early years block would be funded under the same census for Pupil Premium as schools? Marie Taylor reported that the Early Years Pupil Premium is indicative based upon the January 2020 Early years census and the indicative allocations are due to be reviewed in the Spring of 2021. A DfE update was awaited.

Schools Forum were consulted and confirmed their support for the proposals detailed below.

Resolved:

- 1) That Schools Forum note the update on the early years block.**
- 2) That Schools Forum agree to increase the current rate of 2-year-old funding to £5.48 per hour and 3 and 4-year-old funding to £4.25 per hour.**
- 3) That all other funding factors remain at current 2020-21 levels or, funded levels.**
- 4) That Schools Forum agree the early years block to fully fund the Early Years Inclusion Fund at the current level. The demand on this fund exceeds this level of funding in the 2020-21 financial year and for that reason, should any significant increase in DfE funding be notified, this fund should be increased accordingly during the financial year, to a maximum of 95% pass through to providers.**

8e Schools Block Update 2021-22 (Delegated Budget)

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on issues relating to the schools delegated budget for 2021-22 and the decisions that would need to be made as part of the budget setting process. Grant highlighted the following:

- That it had been previously agreed that Wiltshire would move as close to the national funding formula (NFF) as possible. In 2020-21 all factors were fully funded at the published NFF values, apart from the Mobility factor. Historically, due to the major beneficiaries being service schools, who were already benefitting from additional one-off growth funding from

the DfE and also the MOD's Education Support Fund, Schools Forum felt that the factor's introduction would not achieve an equitable position. A school's mobility position could move each year and is less predictable as a factor;

- The main funding formula for 2021-22 was similar to 2020-21 but the key following changes should be noted:
 - An increase in Pupil and School led funding values of 3%
 - Teachers Pay and Pension Grants being baselined into AWPU values
 - IDACI data has been refreshed
 - Minimum Funding Guarantee to be set between 0.5% and 2.0% to ensure all schools see a gain in funding on their pupil led funding
 - Maximum Sparsity funding being increased from £26,000 to £45,000 for small and rural primary schools
 - Increases in the minimum per pupil funding levels (MPPFL) to £4,180 and £5,415 in primary and secondary schools
- Initial modelling suggests that the NFF is fully affordable for all schools in Wiltshire which is a real milestone which includes:
 - Full NFF values applied for all funding factors
 - Increased Sparsity funding in line with NFF proportional increases
 - Mobility included and funded at NFF values
 - MFG set at the maximum level of 2%
 - Split site increased £90,000 as agreed with Schools Forum (76.4% of lump sum value)
 - Transfer from Schools' Block to High Needs Block of 0.5% (£1.517m)
- Growth allocations for 2021-22 are based upon pupil data from the October 2020 census and the October 2019 census. Criteria for growth was agreed at the December meeting of the Forum. No new schools were opened in 2020-21 and £1.814 million was allocated from the DfE for the 2021-22 growth fund;
- There were no plans to open any new schools in the 2021-22 year. The growth fund supports new primary and secondary schools with diseconomy costs for the first 7 years or until the school is full. The Basic Need Class Expansion for additional classes is still to be confirmed with colleagues in the School places team for the 2021-22 academic year. The Infant Class Size increases have been confirmed for 2020-21 with six schools being funded through this factor;
- Following the additional funding pledge, the DfE are seeking to ensure that all schools see an uplift in their calculated per pupil funding and have therefore proposed that the Minimum Funding Guarantee (MFG) is set at a positive figure of between 0.5% and 2.0%. Setting a positive MFG of

2% is fully affordable and will ensure that all schools see an uplift in their 'per pupil' funding of at least 2%. The cost to the formula in 2021-22 is less than £0.250m, subject to decisions taken by the Forum later in the meeting;

- Sparsity is an optional funding factor and prior to the introduction of the NFF, Wiltshire had chosen not to support sparsity funding due to the inequitable situation which can arise where two 'like' schools are funded differently simply because one school is deemed eligible for sparsity funding;
- As part of the DfE's proposals to support small and rural schools, the maximum sparsity value for primary schools was increased from £26,000 to £45,000, with Secondary schools increasing from £67,500 to £70,000. This would affect 28 eligible primary schools and 2 secondary schools. The table at paragraph 28 of the report showed the impact of the changes at the maximum NFF rates, a 3% uplift and keeping them the same as the current values;

The Diocesan representative asked if the maximum rates for sparsity were affordable for Wiltshire. Grant Davis confirmed that they were. The Diocesan representative expressed the view that it would seem logical to go for the recommended national level of funding in their view. Grant confirmed that models would be shown later in the meeting for the Forum to decide at what level to set sparsity funding for 2021-22.

- The national methodology was introduced, and Wiltshire has received funding through the NFF for Mobility, however, applying the factor remains optional and to be determined by the Forum. It has not previously been implemented;
- Following the release of the October 2020 census data, modelling of the mobility factor has moved significantly from the 2020-21 year to the 2021-22 year. Of the eligible schools in 2021-22, there are 11 service schools and 48 non-service schools eligible for the funding. It is important to reconsider the introduction of the mobility factor as it will help compensate lagged funding. If mobility is not funded, it will have a knock-on impact upon MFG and Minimum Per Pupil Funding Levels (MPPFL) funding;
- The Minimum Per Pupil Funding Levels (MPPFL's) were introduced as part of the NFF and have been increased annually as part of the DfE's proposals to standardise funding across the country. These are mandatory as part of the NFF and therefore there is no scope for amending these values without permission from the Secretary of State; and
- Following the decision to include the Teachers Pay and Pension Grants within the AWPU funding values, increasing them by £180 and £265 for

primary and secondary, the MPPFL rates have also been increased accordingly to £4,180 and £5,415.

Resolved that Schools Forum:

1. **Note the schools block update report.**
2. **Agree to apply all the funding factors at the 2021-22 NFF rates.**
3. **Note the modelling of the Mobility factor and agree to introduce Mobility as a funding formula factor.**
4. **Note the modelling of the Sparsity factor and agree to apply a proportional uplift of 3% for 2021-22.**
5. **Agree to set the Minimum Funding Guarantee at a level of +2.0%.**
6. **Agree that the Growth fund be set at £2.21 million – split £0.1 million Infant Class Size and £2.1 million basic need.**

(The decisions numbered 2-6 above were made later in the meeting under Agenda item 9)

The Forum agreed to suspend the meeting at 3.12pm for a comfort break. The meeting reconvened at 3.18pm.

The Clerk confirmed that as this was a virtual meeting, a roll call vote would be carried out for any decisions to be made when all Forum members were not in unanimous agreement/disagreement.

9 School Budget Decisions 2021-22

The Chair led the Forum through the Decision Matrix (completed version attached as Appendix 1 to these minutes) and the decisions as detailed below were made:

Resolved:

Early Years Block *(Confirmation below of decisions around Early Years agreed earlier in the meeting)*

1. **Schools Forum agreed to increase the current rate of 2-year-old funding to £5.48 and 3 and 4-year-old funding to £4.25 per hour.**
2. **The early years block to fund the Early Years Inclusion Fund at £357,000.**
3. **If any significant increase in DfE funding be notified, the Early Years Inclusion fund should be increased accordingly during the financial year, of at least 95% pass through to providers.**

Central Schools Services Block

4. The Section B expenditure for the Central Schools Services block is agreed as follows:

Education Welfare Service	£0.199 million
Asset Management	£0.186 million
Statutory/Regulatory duties	£0.669 million
Admissions	£0.438 million
Servicing of Schools Forum	£0.003 million

5. Central spend on historic commitments (Section C) agreed as follows:

- i) Funding for LAC Personal Education Plans be funded at £0.103 million;
- ii) Funding for Child Protection Officer in Schools Adviser at £0.056 million; and
- iii) Prudential Borrowing at £0.208 million.

6. Schools Forum note the LA decision (Section A) to set budget at £0.395 million for central copyright licences for 2021-22.

7. These allocations allow a transfer of £0.192M to support the high needs block.

8. Schools Forum agree that there be no top slice for services formerly funded from the general duties' element of ESG pending DfE grant announcement unless a significant change to DfE grant for School Improvement is notified.

High Needs Block

9. Schools Forum agreed that top up values for Named Pupil Allowances, Extended Learning Programme's Resource Bases and Special Schools are to remain at the 2020-21 values and note the proposed consultation on High Needs formula for 2022-23 with less weighting on the historical funding factor.

10. Schools Forum approve the content of the DSG Management Plan as set out on pages 17 to 44 of the Agenda Supplement.

Schools Block – Delegated Budget

11. Schools Forum agree to apply all the funding factors at the 2021-22 NFF rates.

12. Schools Forum note the modelling of the Mobility factor and agree to introduce Mobility as a funding formula factor.

13. Schools Forum note the modelling of the Sparsity factor and agree to apply a proportional uplift of 3% for 2021-22.
14. Schools Forum agree to set the Minimum Funding Guarantee at a level of +2.0%.
15. Schools Forum to agree that the Growth fund be set at £2.21 million – split £0.1 million Infant Class Size and £2.1 million basic need.
16. Schools Forum agree to transfer up to a maximum of £1.517 million (0.5%) from Schools block to High Needs block.
17. That the budgets for De-delegation of central services be agreed as follows:

i)	Access Budget Software	£52,544	
ii)	FSM Eligibility	£27,804	
iii)	Trade Union	£70,000	
iv)	EMAS & Travellers	£542,796	(Primary only)
v)	Behaviour support	£639,105	(Primary only)
vi)	Maternity supply	£549,158	
18. That Schools Forum agree to set the overall Schools Budget at the level of the DSG Settlement – namely £406,341,860.

Appendix 1 to Minutes - Completed Decision Matrix

10 **Confirmation of Dates for Future Meetings**

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

11 March 2021
 10 June 2021
 7 October 2021
 9 December 2021.

11 **Urgent Items**

There were no urgent items.

(Duration of meeting: 1.30 - 3.45 pm)

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

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Schools Forum - January 2021
 Decision Matrix for 2021-22 Budget

DSG Block	Decision Required	Inter-dependencies with other decisions	Proposal	Decision Maker			Decision - noted at meeting
				Local Authority	Schools Forum	DfE	
Overall Budget	Overall Schools Budget	individual decisions for blocks to feed in	Schools Budget to be set at level of DSG Settlement £406,341,860	Decides	Proposes		Agreed Neil & George, Aileen & Nigel
Central Schools Services Block	Ongoing commitments eg Admissions, Schools Forum support, Services formally funded from retained duties element of ESG		Line by Line summary, appendix to Central DSG Report. Summarised in Proposed Budget summary Propose as presented in Appendix	Proposes	Decides for each line	Adjudicates if Schools Forum does not agree LA proposal	Agreed at Decision Matrix - Neil & David W
	Central spend on historic commitments	will inform any further funding to be delegated if spend is not agreed, is not evidenced or does not meet criteria	Propose agree eligible expenditure as per table in Central Schools Services Block Report	Proposes	Decides for each line	Adjudicates if Schools Forum does not agree LA proposal	Agreed at Decision Matrix - Neil & David W
	Central Licences negotiated by Secretary of State		Propose Budget for central copyright licences set at £0.395m	Decides	None	None	Noted, Neil & Nigel
Page 15	Central spend on general duties for maintained schools - services previously funded by ESG general duties rate	would be a top slice for maintained school budgets - impacts on delegated budget decision	No top slice proposed -pending DfE Grant announcement	Proposes	Decided by maintained school members	Adjudicates if Schools Forum does not agree LA proposal	Agreed at Decision Matrix - Neil & George KT
Schools block - Delegated Budget	Affordability of local formula		Converge as closely as possible to the NFF and fund factors at the NFF rates.	Proposes and decides	must be consulted	Ensures formula is compliant with regulations	Agreed Neil & Lisa and Nigel
	Introduction of the Mobility factor		Following completion of Army Rebasings and greater stability of school populations, review the principle of funding Mobility for those schools with significant Mobility and suffering lagged funding.	Proposes and decides	must be consulted	Ensures formula is compliant with regulations	Agree to introduce Neil & Giles
	Sparisty funding rates		Confirm the sparsity funding rates for 2021-22, based upon options presented, fund at full NFF rates, uplift by 3% (NFF uplift) or retain the 2020-21 rates.	Proposes and decides	must be consulted	Ensures formula is compliant with regulations	3% Uplift - voted
	Minimum Funding Guarantee		Propose set MFG positive 2%	Proposes and decides	must be consulted	Ensures formula is compliant with regulations	Neil & Lisa

Schools Forum - January 2021
Decision Matrix for 2021-22 Budget

DSG Block	Decision Required	Inter-dependencies with other decisions	Proposal	Decision Maker			Decision - noted at meeting
	Growth fund		Growth fund to be set at £2.21m - split £0.1m Infant class Size and £2.1m basic need Criteria remain unchanged from previous year and agreed at Schools Forum meeting December 2020, Total growth funding awarded by DfE of £1.814M to Wiltshire.	Proposes and decides	must be consulted	Ensures formula is compliant with regulations	Agreed Neil & Lisa and Nigel
	Transfer to High Needs from Schools Block		To Transfer up to a maximum of £1.517m from Schools Block to High Needs Block. This equates to 0.5% of the Schools Block (net of Teachers Pay and Pension funding).	Proposes and decides	must be consulted	Subject to SofS Agreement beyond 0.5%	First to be discussed, Neil & David W
	De-Delegation of Central Services		Access Budget Software - £52,544	Proposes	Decides for each line	Made by Maintained only	at Decision Matrix point Neil & Nigel
Page 16	De-Delegation of Central Services		FSM Eligibility - £27,804	Proposes	Decides for each line	Made by Maintained only	at Decision Matrix point Neil & Andy B
	De-Delegation of Central Services		Trade Union - £70,000	Proposes	Decides for each line	Made by Maintained only	at Decision Matrix point Neil & Nigel
	De-Delegation of Central Services		EMAS & Travellers - £542,796	Proposes	Decides for each line	Made by Maintained only	at Decision Matrix point Neil & Nigel
	De-Delegation of Central Services		Behaviour Support - £639,105	Proposes	Decides for each line	Made by Maintained only	at Decision Matrix point Neil & Catriona
	De-Delegation of Central Services		Maternity Supply - £549,158	Proposes	Decides for each line	Made by Maintained only	at Decision Matrix point Neil & Nigel
High Needs Block	Top Up values for NPAs, ELP, Resource Bases and Special Schools		Initial proposal no change from 2020-21 values - note proposed consultation on High Needs formula for 2022-23 with less weighting on the historical funding factor.	Decides	none - but would consult Schools Forum	none	Neil & Lisa P at Decision Matrix
	Approval of the draft DSG Management Plan, prior to submission to Cabinet and the DfE		Schools Forum to approve the content of the DSG Management Plan, as set out in the DfE's Management Plan template.	Decides	none - but would consult Schools Forum	none	Agreed during report
Early Years Block	Agree Wiltshire formula		Proposed formula as per EY Block report Proposed Basic Hourly rate increases to £4.25 for 3&4 year olds and £5.48 for 2 year olds.	Proposes and decides	must be consulted	none	Agreed during report

Schools Forum - January 2021
Decision Matrix for 2021-22 Budget

DSG Block	Decision Required	Inter-dependencies with other decisions	Proposal	Decision Maker			Decision - noted at meeting
	Level of Inclusion Support Fund and how funded	Links to High Needs Block decisions	Proposed ISF £357,000 as in the 2020-21 year.	Proposes and decides	must be consulted	none	Agreed during report
	% Pass Through to settings		Proposal in Early Years report for maintaining at least 95% pass through	Proposes and decides	must be consulted	none	Agreed during report

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