

Schools Forum

MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 8 DECEMBER 2022 AT COUNCIL CHAMBER - COUNTY HALL, BYTHESEA ROAD, TROWBRIDGE, BA14 8JN.

Present:

Aileen Bates, Angela Brennan, Andy Bridewell, Stella Fowler, John Hawkins, Graham Nagel-Smith, Nick Norgrove, Lisa Percy, Giles Pugh, John Read, Graham Shore, Ros Sutton, Ian Tucker, and Catriona Williamson

Also Present:

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

18 Apologies/Substitutions and Changes of Membership

Apologies were received from Nikki Barnett, Lyssy Bolton, Rebecca Carson, Michele Chilcott, Cllr Ross Henning, Georgina Keily-Theobald, Emma Osmund, Trudy Srawley and David Whewell and from Andrew Best (Head of School Effectiveness), Cllr Jane Davies (Cabinet Member for Adult Social Care, SEND, Transition and Inclusion), Helean Hughes (Director – Education & Skills), Cate Mullen (Head of SEND & Inclusion) and Lucy Townsend (Director of Children's Services).

Substitutions

There were no substitutions.

19 Minutes of the Previous Meeting

The minutes of the meeting held on 6 October 2022 were presented.

Resolved:

That the Chair approve and sign the minutes of the meeting of Schools Forum held on 6 October 2022.

20 Chair's Announcements

The Chair made the following announcements:

Welcome

To Nick Norgrove from Abbeyfield School in Chippenham who has now been confirmed as the new maintained secondary school representative.

21 **Declaration of Interests**

There were no interests declared.

22 **Public Participation**

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

23 **Updates from Working Groups**

The Forum noted the update received by way of the minutes of the joint meeting of the School Funding and SEN Working Group held on 21 November 2022. There were no questions arising.

The Forum noted the update received by way of the minutes of the meeting of the Early Years Reference Group meeting held on 23 November 2022. There were no questions arising.

Resolved:

That Schools Forum note the minutes of the joint meeting of the School Funding and SEN working group held on 21 November 2022 and the meeting of the Early Years Reference Group held on 23 November 2022.

24 **Dedicated Schools Budget - Budget Monitoring 2022-23**

Marie Taylor (Head of Finance – Children and Education) referred to the report which presented the year end budget monitoring information against the DSG for the financial year 2022-23 as at 31 October 2022 and highlighted the following:

- The overspend forecast of £9.260m was currently projected against the overall schools budget which was an increase of £2.223m which was largely due to the finalised September specialist school placements for the new academic year and a result of teams making gains on the inevitable delay due to children not being in school and able to be assessed during the pandemic and the social and educational wellbeing impact of lockdown on children had meant that the number of EHCP plans had exceeded pre-pandemic rates;
- For the early years budgets there was a forecast underspend of £2.386m although it was anticipated that that the DfE's post financial year adjustment would adjust for this in whole or in part in the 2023-24 financial year if the January 2023 census numbers fall. The Inclusion Support Funding for those with additional needs was forecast to be overspent for first time as the offer had been extended for 30 hours in settings so that working parents could take advantage of it;

- Officers had been successful with a 2022-23 bid for COMF grant funding to use in early years settings to allow them to remain open. The Hardship fund had not had much take up in previous years but was available if needed;
- The forecast underspend on the schools budget of £0.141m largely related to the school supply cover fund which was helping to offset the overall pressure on the DSG;
- The high needs budgets continued to be of concern with a projected overspend of £11.820m. The biggest areas of overspend are Independent Special School packages, alternative provision, named pupil allowances and top ups;
- There was a projected 16.1% increase in the number of EHCP's and it was hoped that this would soon reach a plateau and then start to drop again over time;
- There was a small forecast underspend of £0.034m of the central school services block budget which had been driven by careful management of the specialist education packages for children in care;
- The DSG reserve brought forward of £25.973m is increased by the positive early years block adjustment. The forecast overspend would take the reserve into a deficit position of £32.446m. The LA was working closely with the DfE Developing Better Value partners CIPFA and Newton to enhance the current plans and this also added insight from other LA action plans and offered the opportunity to bid for transformational funding; and
- 75% of LA's have a deficit DSG and those worst affected are part of the Safety Valve programme and those on the next level down are part of the Developing Better Value programme which Wiltshire are part of.

Resolved:

That Schools Forum note the year end budget monitoring position as at 31 October 2022 in conjunction with the high needs recovery plan and the Developing Better Value update.

25 **SEND Update**

Marie Taylor (Head of Finance – Children and Education) gave an update on SEND on behalf of Cate Mullen (Head of SEND & Inclusion) who was not able to be present at the meeting and highlighted the following;

- The current developments in SEND were:
 - i) SAIL (new Special School in the South of the County) to open in September 2023 to provide additional ASC/SEMH specialist places

- ii) The Silverwood School new build would open for September 2023 – the cabinet meeting on 13 December 2022 would be discussing proposals for the sites in Chippenham and Trowbridge – [click here for the link of children speaking to Newsround about the Silverwood school](#)
 - iii) Additional resource bases opened in September 2022 (Clarendon and Kiwi) with another due to open in January 2023 (Lyneham)
 - iv) Work underway to commence phase 1 of Secondary Resource Base provision in September 2023 with further phases planned
 - v) Participation in the Delivering Better Value (DBV) programme – the LA were hoping to be in the third tranche of the DBV programme to gain funding to progress work
 - vi) Ongoing recruitment activity in statutory SEND and EP services
 - vii) Recognition of challenge around primary SEMH provision
- The DfE had confirmed verbally that the Supplementary Grant would be receivable for 2023-24 and to assume the same sort of allocation (£2.3m) for planning purposes. Part of this funding would be used to fund the minimum funding guarantee for Special schools to bolster inclusion and ensure that there are sufficient levels of leadership;
 - The areas being considered moving forward (which have been extracted from the safety value learning) were:
 - i) Early intervention focus
 - ii) Increased SEN support offer
 - iii) Review of EHCP assessment processes and thresholds
 - iv) Culture change and work with school leaders
 - v) Appropriate and through provision mapping with potential development of more local provision.

Resolved:

That Schools Forum note the SEND update.

26 **Dedicated Schools Grant Consultations 2023-24**

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on the results of the recent autumn consultations relating to de-delegation of central services and the transfer of funds from Schools Block to the High Needs Block and highlighted the following:

De-Delegation

- The consultation took place in the autumn term and 21 responses were received – 18 from primary schools and 3 from secondary schools. This compared slightly less favourably than the contact for the previous year, however it is widely known that that schools rely on their Schools Forum colleagues to make appropriate decisions on their behalf. The results received were significantly in favour of retaining the de-delegated services in both the primary and secondary schools;

Transfer between Blocks

- For a number of years Schools have been consulted regarding a potential transfer of funds between the Schools block and the High Needs block to help with the increasing demand and costs of SEN within the county and whilst this was a generally unwelcome question to ask schools this has been supported and the transfers made of 0.5% from the 2020-21 financial year;
- There was a good response from schools (21) to the consultation which was from 14 primary and 7 secondary schools. They all agreed that there should be a transfer of some funds to the High Needs block and only one school was in favour of a reduction in Top-Up values. 17 of the respondents supported a transfer of up to £1.71m (0.5%) to the High Needs block;
- Schools Forum members were being asked to consider the consultation results and make in principle decisions relating to the de-delegation of central services and for the support of a transfer to the High Needs block.

Resolved: That Schools Forum

- 1. Note the local consultation responses in relation to the schools delegated budget for the 2023-24 financial year.**
- 2. Agree that the following “in principle” decisions be made relating to de-delegation of central services for primary and secondary Maintained schools**
 - i. FSM – primary and secondary**
 - ii. Licences – primary and secondary**
 - iii. Trade Union – primary and secondary**
 - iv. Maternity – primary and secondary**
 - v. Ethnic Minority Support – primary only**
 - vi. Traveller Education – primary only**
 - vii. Behaviour Support – primary only**
- 3. Agree to a block transfer between Schools Block and the High Needs Block, subject to affordability when school funding for 2023-24 has been confirmed of 0.5% (the maximum allowable without Secretary of State approval) which equates to approximately £1.71m.**

27

Local Consultation - School Improvement Services 2023-24

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought to update Schools Forum on the results of the recent consultation with maintained schools relating to the removal of the Local Authority Monitoring and Brokering (LAMB) Grant for 2023-24 and highlighted the following:

- The LAMB had been provided to LA's since 2017, to help fulfil their core improvement activities, which was based on the number of maintained schools. The proposals from the DfE were to reduce the grant by 50% in 2022-23 with full removal in the 2023-24 year. For the 2022-23 year, maintained schools members of Schools Forum agreed to fund the loss of 50% of the LAMB grant through de-delegation and would consult colleagues once again before any decision would be taken for the 2023-24 year;
- The consultation was open to all maintained schools and 39 responses were received from 4 secondary, 34 primary and 1 special school. The overall results showed that the majority supported funding of the LAMB grant at 100% as their first choice. This was also the preference for primary schools; and
- Out of the 5 responses from secondary and special schools the preference was to fund the LAMB grant at 50%, but Officers were aware that subsequent to the consultation that schools had been in discussions with Andrew Best (Head of School Improvement) and that there had been a slight change in the thinking of how the LAMB grant should be funded.

A primary school governor representative commented that the figures demonstrated that collectively, there was more support funding a 75% - 87.5% loss of LAMB funding. Grant Davis responded that Officers had to draw conclusions from the consultation but that it was not an exact science and yes there was a mixed bag of responses. Grant was aware that the Primary Heads Forum had also met with Andrew Best to discuss the School Improvement offer going forward. With the consultation findings and the value added discussions that had happened since between Andrew Best and schools, Andrew had indicated that he would have a year to demonstrate the value of the School Improvement service and if it did not perform as expected for schools then of course he would assume that schools would not agree to funding of it in future years.

A maintained primary representative confirmed that she had been worried about committing to the funding of the LAMB grant but recognised the support given by the School Improvement service to the schools who may be looking to become an academy. However, given the current financial issues for schools with pay increases etc she was hearing now from colleagues that perhaps the schools would prefer for 87.5% of funding of the LAMB grant.

A maintained secondary school representative reported that he had met with Andrew Best who acknowledged that he had 12 months to show value for money. The representative felt that if they didn't support the grant at this level the impact would be significant and on behalf of maintained schools, he was in support of the funding of 100% of the LAMB grant.

The primary school governor representative reported that she had concerns around the clarity of the role of the School Improvement Officer but from listening to comments was now slightly reassured. Grant Davis reported that Andrew Best had worked hard to share with schools his intentions for the service and how he planned to deliver the model of support. If the funding for the LAMB grant was not approved schools could pool their money together to purchase an external school improvement service as part of a cluster arrangement. However the emphasis was clearly for Andrew Best to deliver a service that schools were happy with otherwise they would vote with their feet in future years.

Resolved: That Schools Forum

- 1. Note the local consultation responses in relation to the school improvement services for the 2023-24 financial year.**
- 2. Agree to make the “in principle” decision of funding the LAMB grant at 100% for the 2023-24 year, for both Primary and Secondary schools.**

28

Allocation of Funding for Pupil Growth 2023-24

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought agreement on the methodology for allocating funding for pupil growth from the schools block Growth Fund 2023-24 and highlighted the following;

- The DfE consultation during the Summer of 2022, proposed options around the future for Growth funding and whilst no decision had been taken, it was recognised that awarding growth funding at a local level would be appropriate, with LA's being able to apply local knowledge and intelligence;
- In Wiltshire, growth is measured by separating the county into 62 Middle Layer Super Output Areas (MSOA's) with an average of 4 schools in each MSOA area. The growth factor allocates £1,520 for each primary 'growth' pupil, £2,275 for each secondary 'growth' pupil and £74,700 for each brand new school that opened in the previous year;
- The Wiltshire allocation for 2023-24 would be announced on or around 16 December 2022 as part of the schools funding announcement and would be allocated using the formulaic approach, based upon lagged growth data. The proposed criteria was unchanged from the 2013-14 year for new school allowance and class expansion for basic need and was also used for infant class size increases;
- LA's can also set aside Schools block funding to create a small fund to support good schools with falling rolls, where local planning data shows that surplus places will be needed within the next three financial years. Any fund established for a Falling Rolls fund would represent a top slice of the Schools block and Schools Forum had previously resisted the

establishing of such a fund with less than 50% of LA's having a Falling Rolls fund; and

- The DfE consultation in the summer of 2022 did propose amendments to the rules surrounding a Falling Rolls fund, however the results of that consultation have not yet been published.

Resolved: That Schools Forum

- 1. Approve the criteria for allocating pupil growth fund in 2023-24.**
- 2. Agree that the budget for the growth fund will be set at its meeting in January 2023 when the full DSG has been confirmed for the 2023-24 year.**
- 3. Will consider establishing of a Falling Rolls Fund and any criteria befitting such a fund once the outcome of the DfE's 2022 consultation has been received.**

29 National Funding Formulae for Schools and High Needs - 2023-24

Grant Davis (Schools Strategic Financial Support Manager) referred to the report which sought 'in principle' decisions with regards to the Wiltshire Funding Formula for the 2023-24 year and highlighted the following;

- The early heads up from the DfE of indicative DSG Block allocations based on the October 2021 census was really helpful and Schools Forum members would recall that this was able to be discussed at the last meeting on 6 October 2022;
- The Government has pledged to boost schools funding with an increase of £2.3bn into the overall Schools Block compared to the 2022-23 year. The DfE allocate school funding on the basis of the National Funding Formula (NFF) and have confirmed that 2023-24 will be another 'soft' year with local Schools Forums still retaining its role in determining the school funding allocation methodology;
- The DfE are proposing to move to the full hard formula by 2027-28 and in the meantime, there would be a tightening on those not aligned to the NFF. Wiltshire have mirrored the NFF for a few years now;
- The main formula for the 2023-24 year was broadly similar to the 2022-23 year with some changes as detailed below:
 - i. Overall, funding through the NFF will increase by 1.9%
 - ii. Core pupil-led funding factors and the lump sum to increase by 2.4%
 - iii. Disadvantaged funding, FSM6 and IDACI factors to increase by 4.3%
 - iv. The 'Minimum per pupil funding level' to increase by 3.3% to;
 - a. £4,405 for Primary
 - b. £5,715 for Secondary

- v. The School Supplementary Grant from 2022-23 has been rolled into the baseline funding and then inflated by the relevant percentage increases.
 - vi. The Free School Meals factor (for the costs of providing a meal for eligible pupils) to increase by 2%
 - vii. Every school to receive at least 0.5% more funding per pupil
 - viii. A transfer of up to 0.5% of Schools Block funding to the High Needs Block will be permitted, subject to Schools Forum approval
 - ix. All NFF factors must be used in the formula and
 - x. The funding for EAL must be the EAL3 factor, meaning pupils will attract funding for the first three years they are within the state school system.
- All NFF factors will be mandatory from 2023-24 and when the final allocations are confirmed in December 2022, they will then go to the Full Council meeting in February 2023 for final ratification.

Resolved: That Schools Forum make “in principle” decisions for the following formula factors to enable school budgets to be prepared ready for the January 2023 meeting.

- a. To apply all the NFF factors in full
- b. To set the Minimum Funding Guarantee at +0.5% (in line with the NFF).

30 **Confirmation of Dates for Future Meetings**

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

19 January 2023 (planned to be face to face at County Hall, Trowbridge)
 16 March 2023 (if required) (Via Microsoft Teams)
 8 June 2023 (Via Microsoft Teams)
 5 October 2023 (Via Microsoft Teams)
 5 December 2023 (Via Microsoft Teams)

31 **Urgent Items**

The Chair gave permission for the following very recent good news update to be shared with Schools Forum members. Grant Davis (Schools Strategic Financial Support Manager) highlighted the following:

Autumn Statement Updates

There had been some good news for the education sector last month as part of the autumn statement with the announcement of £2.3bn in extra funding for 2023-24. Initially it was thought that this was ‘recycled’ funding but it is additional monies. However, the £300m for the National Insurance increase was being withdrawn as that decision has been reversed so there would be £2bn being split between the High Needs and Schools blocks.

The indicative figures from the DFE show that it would be roughly similar to this year’s School Supplementary grant. It was likely to be called something else to

avoid confusion. Schools would receive a per pupil rate, an element for FSM6 and a lump sum increase.

Additional Devolved Formula Capital Grant for Schools for the 2022-23 financial year

The DfE have announced that schools and sixth-form colleges will receive an allocation from an additional £447 million of capital funding to improve energy efficiency in the 2022-23 financial year. The funding is for all schools and payments will be made in late December/early January 2023. The school should spend this funding on capital projects with priority being given to improve the school estate's energy efficiency, although this funding would not be funding ring fenced for energy efficiencies.

The DfE anticipate schools will use the funding in the 2022-23 financial year, however any unspent monies could be carried forward into the next financial year. The allocations were based upon all schools receiving a flat rate of £10,000, plus an amount of £20.06 per weighted pupil. For Wiltshire this was anticipated to be an extra £4.2m of capital and the average school would receive £17,894. Schools would be able to choose how this was spent as there were no known reporting requirements to the DfE.

A maintained primary school representative asked if there any news on the whether the PE grant would continue. Grant Davis reported that there was nothing definitive of this but that he hoped that this would continue and there was a need for physical education and health awareness for children and young people.

Resolved:

That Schools Forum note the updates.

(Duration of meeting: 1.30 - 3.05 pm)

The Officer who has produced these minutes is Lisa Pullin, of Democratic Services, direct line 01225 713015 , e-mail committee@wiltshire.gov.uk

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