

# AGENDA

**Meeting:** Schools Forum  
**Place:** Council Chamber - County Hall, Bythesea Road, Trowbridge, BA14 8JN  
**Date:** Thursday 12 December 2024  
**Time:** 1.30 pm

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

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<b>Membership:</b>	<b>Representing:</b>
Aileen Bates	WGN - Special School Governor Representative
Lyssy Bolton	Early Years Representative
TBC	Observer - Children and Families Voluntary Sector Forum
Helen Carpenter	Chair of WASSH - Secondary Academy Representative
Stella Fowler	WGN - Primary School Governor Representative
Jo Grenfell/Nikki Barnett	Observer - Post 16, Wiltshire College
John Hawkins	Teaching Association Representative
Toni Hayzen	PHF - Primary Academy Representative
Cllr Ross Henning	Observer - Local Youth Network
Brett Jouny	WASSH - Secondary Academy Representative
Georgina Keily-Theobald	WASSH - Maintained Special School Representative
Emily Mullord	PHF - Primary Academy Representative
Nick Norgrove	WASSH - Maintained Secondary School Representative
Lisa Percy	WASSH - Secondary Academy Representative
Edward Powe	PHF - Maintained Primary Representative
Giles Pugh	Salisbury Diocesan Board of Education Representative
John Read	PHF - Maintained Primary Representative
Graham Shore	PHF - Primary Academy Representative
Adam Smith	PHF - Maintained Primary Representative
Trudy Srawley	Observer - Wiltshire Parent Carer Council
Ros Sutton	WGN - Primary School Governor Representative
Karen Venner	Early Years Representative
David Whewell	WGN - Secondary School Governor Representative
Nicola Whitcombe	WASSH - Special School Academy 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 - 18*)

To approve as a correct record and sign the minutes of the meeting held on 17 October 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 10 December 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 5 December 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 19 - 22*)

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

- Early Years Reference Group – 26 November 2024 – *to follow*
- Joint meeting of the School Funding Working Group and SEN Working Group – 28 November 2024 – *attached*.

7 **Dedicated Schools Budget - Budget Monitoring 2024-25** (*Pages 23 - 28*)

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 2024-25 as at quarter 2 2024-25 (September 2024).

8 **Dedicated Schools Grant Consultations 2025-26** (*Pages 29 - 34*)

The report of Grant Davis (Schools Strategic Financial Support Manger) seeks to update Schools Forum with the results of the recent autumn consultations relating to the de-delegation of central services and de-delegation in support of former Local Authority Monitoring and Brokering (LAMB) Grant for maintained schools.

9 **Allocation of Funding for Pupil Growth 2025-26** (*Pages 35 - 40*)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks agreement on the methodology for allocating funding for pupil growth from the school's block growth fund in 2025-26.

10 **National Funding Formulae for Schools - 2025-26** (*Pages 41 - 46*)

The report of Grant Davis (Schools Strategic Financial Support Manager) seeks to obtain 'in principle' decisions from Schools Forum with regards to the Wiltshire funding formula for the 2025-26 year and to update on the National Funding Formula for 2025-26.

11 **Schools Block Transfer 2025/26 - Consultation Outcome Report** (*Pages 47 - 62*)

The report of Liz Williams (Finance Lead – High Needs Sustainability) seeks to update Schools Forum on the outcomes of the consultation on the proposal to transfer 1% from the schools block to the high needs block in 2025-26.

12 **Updates from SEND Transformation Programme**

Liz Williams (Finance Lead – High Needs Block Sustainability) and Ben Stevens (Sustainability Strategic Lead) will give a verbal update on the SEND Transformation programme at the meeting.

13 **Confirmation of Dates for Future Meetings**

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

23 January 2025  
13 March 2025  
12 June 2025  
9 October 2025  
11 December 2025.

14 **Urgent Items**

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

**PART II**

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

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## Schools Forum

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### MINUTES OF THE SCHOOLS FORUM MEETING HELD ON 17 OCTOBER 2024 VIA MICROSOFT TEAMS.

**Present:**

Aileen Bates, Lyssy Bolton, Helen Carpenter, Stella Fowler, John Hawkins, Toni Hayzen, Brett Jouny, Georgina Keily-Theobald, Nick Norgrove, Lisa Percy, Ed Powe, Giles Pugh, John Read, Graham Shore, Ros Sutton, David Whewell, and Nicola Whitcombe

**Also Present:**

Grant Davis (Schools Strategic Financial Support Manager), Daryl Freeman (Director – Children & Education), Ellen Ghey (Democratic Services Officer), 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), Liz Williams (Finance Lead – High Needs Block Sustainability) and Cllr Suzanne Wickham

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31 **Election of Chair for 2024-25**

Nominations were sought for a Chair for the forthcoming year. On the nomination of Graham Shore, seconded by Georgina Keily-Theobald, it was:

**Resolved:**

**The Schools Forum elected Lisa Percy as Chair of the Schools Forum for the forthcoming year 2024-25.**

32 **Election of Vice Chair for 2024-25**

Nominations were sought for a Vice-Chair for the forthcoming year. On the nomination of Lisa Percy, seconded by John Read, it was:

**Resolved:**

**The Schools Forum elected Graham Shore as Vice-Chair of the Schools Forum for the forthcoming year 2024-25.**

33 **Apologies, Substitutions and Changes of Membership**

Apologies for absence from Members were received from:

- Councillor Ross Henning
- Emily Mullord
- Adam Smith
- Trudy Srawley

- Karen Venner

Further apologies were noted from:

- Councillor Jane Davies
- Kathryn Davis (Director – Education & Skills)
- Councillor Nabil Najjar

The Chair announced the following Membership changes:

- Emily Mullord and Toni Hayzen were welcomed to the Schools Forum as Primary Academy Representatives.
- Ed Powe and Adam Smith were welcomed to the Schools Forum as Maintained Primary Representatives.
- Brett Jouny was welcomed to the Schools Forum as a Secondary Academy Representative.

The Chair also welcomed Daryl Freeman to the meeting as the new Wiltshire Council Director for Children and Education.

#### 34 **Minutes of the Previous Meeting**

The minutes of the previous meeting held on 27 June 2024 were presented for consideration.

Members were informed that a question had been submitted to officers with regard to Minute 24, Annual Schools Consultation – Transfer of funding from Schools Block to High Needs Block 2025-26. In response, officers confirmed that a transfer of 1% from the Schools Block to the High Needs Block could not be undertaken without consulting all schools and the Schools Forum. Despite this, it was clarified that Local Authorities were able to submit a request for disapplication to the Secretary of State if an agreement could not be reached with the Schools Forum. However, it was further noted that the consultation provided comprehensive details on how the additional funds would support the High Needs Block and the indicative impact based on the 2024-25 figures.

Members were reassured that all consultation responses would be considered when deciding upon any transfer, and Members were encouraged to both submit their views and to also promote the consultation to other colleagues in order to better understand the opinion of Wiltshire schools and make the right decision for all.

Following which, it was:

#### **Resolved:**

**The Schools Forum approved and signed the minutes of the previous meeting held on 27 June 2024 as a true and correct record.**

#### 35 **Chair's Announcements**



The Chair informed Members that the order of the agenda would be amended to accommodate conflicting work commitments. Therefore, Agenda Number 13, Update on FACT Partnership Transformation Programme, would be brought forward and considered before Agenda Item 10, Schools Revenue Surplus and Deficit Balances 2023-24.

36 **Declaration of Interests**

There were no declarations of interest.

37 **Public Participation**

It was noted that a question had been received but had not met the deadlines as set out in the agenda. As such, officers had agreed to provide a response after the meeting.

38 **Updates from Working Groups**

The Chair raised the updates from the last meetings of the Early Years Reference Group held on 27 September 2024, and the previous joint meeting of the School Funding Working Group and SEN Working Group held on 23 September 2024.

There being no questions or comments on the updates, it was then:

**Resolved:**

**The Schools Forum noted the updates from the previous meeting of the Early Years Reference Group held on 27 September 2024, and the previous joint meeting of the School Funding Working Group and SEN Working Group held on 23 September 2024.**

39 **Wiltshire Schools Forum Proportionality, Membership and Terms of Reference**

A report on the Wiltshire Schools Forum Proportionality, Membership, and Terms of Reference was presented by Lisa Pullin, Democratic Services Officer.

Members were reminded that the Membership of the Schools Forum was reviewed on an annual basis, with all those who make appointments of named representatives being asked to confirm those persons for the ensuing academic year. As such, it was confirmed that on 13 June 2024, officers had conducted a review of the balance of Membership being Maintained Primary Schools, Maintained Secondary Schools and Academies, and Special School Members. This showed that the current Membership would not need to be amended as it reflected the current breakdown of the total numbers on roll in schools as at the October 2023 census and updated for Academy conversions.

Furthermore, the Terms of Reference of the Schools Forum were last reviewed by the Forum at their meeting on 6 October 2022, and subsequently approved by the Cabinet Member for Children, Education, and Skills on 4 January 2023. As there were no changes to the proportionality, it was proposed that no changes to the Terms of Reference were required.

Following which, it was:

**Resolved:**

**The Schools Forum:**

- a. **Noted that the proportionality of the Forum had been reviewed and that no changes were recommended.**
- b. **Noted that no changes to the Terms of Reference as at 4 January 2024 were recommended.**
- c. **Noted the current Membership details of the Forum.**
- d. **Noted that there were no current vacancies for the Schools Forum, although if any arose, that they be appointed to as soon as possible.**

40 **Schools Revenue Surplus and Deficit Balances 2023-24**

Grant Davis, Schools Strategic Financial Support Manager, introduced the report which presented the position of revenue balances for Wiltshire Maintained Schools as at 31 March 2024, and identified those in surplus and deficit. The following was then highlighted:

- The net surplus balances for the financial year 2023/24 were confirmed as £11.3m with 95 schools holding surplus balances of £13.1m and 14 schools in deficit to a value of £1.9m.
- When comparing the figures to those of last year, it was highlighted that there had been a slight reduction in the net surplus balances of £0.9m. However, the number of Local Authority (LA) Maintained Schools had decreased from 116 to 109 over the period of 31 March 2023 to 31 March 2024. Furthermore, it was highlighted that the data did not include those schools which had converted to academies during the financial year.
- Paragraph 5 of the report was highlighted which presented a breakdown of the movement of net revenue balances over the last 3 financial years and showed that the balances were generally coming down across Primary, Secondary, and Special Schools over that period.
- Appendix 1 of the report was then highlighted which showed a breakdown of all individual Maintained Schools' revenue surplus and deficit balances. It was noted that there were two trigger points in which

the Department for Education (DfE) could request further information from LAs and these were detailed in Paragraph 8 of the report.

- Appendix 2 of the report was then raised alongside Appendices 3 and 4 which noted that an investigation could be triggered by the DfE as per Paragraphs 8a and 8b of the report, as there were 9 schools that have held a revenue balance of 15% or more of their school budget share over the past 5 years, and 4 schools that have held deficit balances of more than 2.5% and £10,000 over the past 4 years.
- Paragraphs 12 through 16 of the report were then noted as the key points for the Forum to consider, with Paragraph 17 detailing the indicative position for 2024-25.
- Finally, it was highlighted that the report presented data from Maintained Schools, which represented approximately 50% of the total schools in Wiltshire.

During the discussion, points included:

- It was confirmed that Wiltshire was not in a dissimilar position to comparable LAs and it was noted that some neighbouring LAs had considered reintroducing a clawback scheme for surplus balances. However, it was highlighted that Wiltshire Council had not had such a scheme in place for approximately 12 years, but that it could be considered in the future. It was further highlighted that schools often retained surplus balances in order to fund specific projects such as refitting or erecting new buildings.
- Following from this, Members queried if a further review of the surplus and deficit balances could be undertaken, if any neighbouring LAs had conducted similar reviews, and if the data on surplus balances was correlated with school effectiveness information. In response, officers confirmed that regular discussions were undertaken between School Finance and School Effectiveness officers in order to understand the broader picture of individual school's budgets. Furthermore, it was noted that the DfE would be aware of the financial positions but had not intervened with Wiltshire Council or any other neighbouring authorities to officers' knowledge with regard to these balances.
- It was clarified that those schools in deficit were in that position for a number of reasons, be that legacy debts with the new school leadership teams working to recover the situation, a drop in pupils on roll, or due to schools receiving a higher number of SEND pupils than expected and subsequently implementing additional support.
- It was noted that differences between individual schools' financial positions could be due to factors such as staffing/class structures, school popularity or dated Planned Admission Numbers (PAN).
- Officers agreed to continue the discussion with Members in other relevant forums such as the School Funding Working Group.

Following which, it was:

**Resolved:**

**The Schools Forum noted the report.**

*Members took a comfort break from 14.55pm to 15.00pm.*

41 **Dedicated Schools Budget - Budget Monitoring 2024-25**

Marie Taylor, Head of Finance – Children & Education, referred to the report which presented the budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2024-25 as at June 2024. The following was then highlighted:

- It was noted that an overspend of £9.983m across all four Blocks of the DSG was forecast against the overall schools budget, with the main driver for the forecast variance being the ongoing pressures on the High Needs Block (HNB). This was noted as being after the transfer of £28.254m from the deficit reserve in line with the Council's Safety Valve Agreement.
- Paragraphs 4 to 6 of the report, including Table 1, reminded Members that the Central Government's three-year statutory override in 2020 to separate Local Authorities' (LA) DSG deficits from their wider financial position had been extended until 2026.
- Each of the individual Blocks were then raised, in the order that they were detailed in the report.
- It was noted that the Early Years Block budgets were projected to underspend by £4.487m. Paragraphs 7 to 8 of the report highlighted the DfE's introduction of an extension to the entitlements for 9 months to 2-year olds and the universal two-year old offer, resulting in a higher budget based on the DfE's introductory assumptions on take-up, however as parent take-up was largely unknown, forecast variances were significant.
- The HNB budgets were then detailed, and it was noted that the projected overspend was £14.658m, with the budgets being increased by the planned drawdown from the DSG reserve to facilitate improved budget monitoring, target setting, and methods of measuring success in respect of recovery planning.
- Paragraphs 11 to 13, including all tables, were then explained.
- The DSG reserve and Safety Valve Agreement were then detailed as per Paragraphs 15 to 17 of the report.

There being no questions or comments, it was:

**Resolved:**

**The Schools Forum noted the forecast budget monitoring position including the balance on the Dedicated Schools Grant reserve at the end of June 2024, together with the report later in the agenda on SEND Transformation.**

42 **Core Schools Budget Grant**

Grant Davis, Schools Strategic Financial Support Manager, introduced the report which updated the Schools Forum on the recently announced Core Schools Budget Grant (CSBG). The following was then highlighted:

- The background to the CSBG was detailed as per Paragraphs 2 to 5 of the report.
- Paragraphs 6 to 9 explained how the CSBG funding would be allocated, with Paragraphs 10 to 14 explaining that the Department for Education (DfE) had stated that the Teachers' Pay Award of 5.5% would be fully funded through the CSBG. However, officers clarified that after calculating allocations for Wiltshire schools, they believed that the CSBG would instead represent a contribution to the additional cost pressures in schools. As such, analysis of the impact of the pay awards and the CSBG grant was detailed in Appendix 1, with Paragraph 14 outlining the key points from the analysis.

There being no questions or comments, it was:

**Resolved:**

**The Schools Forum noted the content of the report and the impact on the Core Schools Budget Grant on individual school budgets.**

43 **Update on FACT Partnership Transformation Programme**

An update on the FACT Partnership Transformation Programme was delivered by the FACT Programme Lead, Simon Thomas, and Paul Holdsworth from the Targeted Education Team. The presentation was split into the two projects underway in Wiltshire, where the following was then highlighted:

**Early Intervention, Prevention and the FACT Project:**

- Members were reminded of Wiltshire's multi-agency Family Help arrangements, with Members being informed that although the project formally closed at the end of March 2025, the core elements had been delivered across Wiltshire.
- The Warminster and Westbury pilot scheme was then briefly detailed, and it was reiterated that the scheme had been created to explore if working together in geographically defined areas in different ways could provide better and more effective early intervention and prevention.
- A graphic was then shown which outlined the different aims of the project and key pieces of feedback received such as ability to self-navigate, improved family dynamics, and engagement of agencies.
- The different approaches implemented were noted, alongside the quantitative impact, key success factors, and extracts of feedback from families and partners.

**School and Family Support:**

- The core functions and activity of the service was detailed, with it being noted that the overall aims were to increase the use of the Early Support Assessment (ESA) process, develop confidence within schools for using the ESA, and make positive impacts for individual children and young people through early help. Further aims were noted as being to support change for the child holistically through the ESA process and plan; working with lead professionals to build confidence and expertise at implementing ESAs; working in the home with families, children, and young people individually; with school staff to support the needs of the children; and to develop confidence and understanding of thresholds, risks, and support action.
- Members were shown the support and early successes so far, alongside data on school staff confidence ratings, initial data captures for impact measuring, and correlations between children and young people with SEND and ESA, and attendance and ESA.
- Officers presented explanations as to the various successes, such as consistency of practitioners with schools to build relationships, working with other Council services and knowing how to sign post effectively, and the ability to offer support in the home.
- Finally, the project's next steps were detailed, including actions such as quality assurance activity of ESAs to develop knowledge of needs for future planning and sharing key messages with schools, linking with the new Mainstream Inclusion School Advisor (MISA) Team, and developing a practice where school staff can support work in family homes.

During the discussion, points included:

- Members queried if there was a correlation between the two projects and the reduction in the number of fixed-term exclusions. In response, officers noted that although the projects did not explicitly seek to capture such data, they had the ability to retrospectively analyse the data and see if there were any learnings to be taken forward and then presented to the Forum at a future date.

### **Resolved:**

**The Schools Forum noted the update.**

#### 44 **SEND Transformation Update**

Liz Williams, Finance Lead – High Needs Block Sustainability, alongside Ben Stevens, SEND and Alternative Provision Lead, updated the Schools Forum on the SEND Transformation Programme. The following was then highlighted:

- Paragraphs 2 to 4 were briefly detailed, and it was confirmed that the new SEND and AP Strategy “Meeting Needs Together – Ambitious for All” was approved by Cabinet on 17 September 2024, with the strategy document attached as Appendix 1 to the report.
- Appendix 2 outlined the second Safety Valve monitoring report sent to the Department for Education (DfE) at the end of August 2024 which

covered the activity and data from June to August 2024. It was emphasised that it was a requirement of the agreement with the DfE for the Council to report against the key conditions of the agreement and on the progress to deliver capital projects associated with the agreement, with Paragraph 8 listing the conditions themselves, and Paragraph 13 listing the status of the conditions.

- Although significant steps had been taken, and much of the planned 'activity' being on track, Members were informed that the time from implementation of the project to realisation of the benefits was greater than anticipated. As such, the Council was not on track to meet Agreement Condition 2 and would exceed the forecast £84.5m cumulative deficit in the financial year 2024/25 (excluding Safety Valve payments).
- Paragraphs 15 to 16 noted the impacts of the increased commitments in the system from activity in the current year, the further mitigations that needed to be implemented in order to reduce spend by the 2028/29 financial year, and the profile of the revised forecast.
- Paragraphs 17 to 19 detailed further financial considerations and confirmed the successful bid for the additional High Needs Provisional Capital Allocations grant made available to Council's on the Safety Valve Programme. Therefore, an additional £5.7m of funding had been secured in order to accelerate the delivery of additional Special School capacity.

During the discussion, points included:

- Members expressed concern at the misjudged perception of timings and confirmation that the Council was not on track to meet the condition to reduce the cumulative deficit. Officers drew attention to the fact that more Education Health and Care Plans (EHCPs) were issued than forecast by this stage of the plan which was driving the increase in spend. On the other hand, this demonstrated the positive action that had been undertaken to clear the backlog of assessments which had resulted in generated plans entering the system quicker than projected.
- Officers noted that the impact of the COVID-19 pandemic had affected the EHCP data more than expected, with the sharp incline in requests post-COVID skewing the initial modelling. However, Members were reassured that since January 2024, the level of EHCP requests had stabilised, giving a more accurate representation of demand for officers to confidently benchmark against.
- Officers emphasised the significant amount of work that was needed to meet the conditions of the agreement, reiterated the need to be transparent on the progress of the plan to date, and highlighted the importance of including all schools, parents, carers, and the Forum as partners in the process.
- Members highlighted early intervention and prevention, and it was confirmed that by being both a key priority and condition within the agreement, officers were focussing on developing increased support in this area so that schools and families could start to see the changes more quickly.

Following which, it was:

**Resolved:**

**The Schools Forum noted the update on the SEND Transformation Programme.**

45 **Review of EHCP Top-Up Funding**

Liz Williams, Finance Lead – High Needs Block Sustainability, updated the Schools Forum on the progress to date of the review of top-up funding that schools receive for pupils with Education Health and Care Plans (EHCPs) to ensure that top-up funding was sufficient to meet need, predictable for both a school and the Local Authority (LA), and affordable within the budget envelope. The following was then highlighted:

- Officers had identified that the banded funding values had not kept pace with increases in costs, which could be a driver for the increased number of re-banding requests and requests for additional support over and above band values, with Paragraph 6 outlining the two key reasons in support of the review.
- Paragraph 9 detailed the workstream progresses to date since the June 2024 meeting of the Schools Forum.
- It was confirmed that officers were now proposing to have all EHCPs on their new funding value from September 2025, giving time to accurately allocated children and young people to their new funding level. It was also proposed that all new EHCPs granted from April 2025 would be allocated their new funding value based on the new Descriptors and Guidance, and that the process to allocate all existing EHCPs onto the new values would begin as soon as the model received sign-off from the School's Forum and Cabinet which was due to be determined in February 2025.
- As per Paragraphs 16 to 30, officers noted that they were seeking the views of the Forum on a number of key principles including the Primary Needs Descriptors, funding mechanism, and consultation. However, officers highlighted that the consultation would not include the funding values as schools funding was not confirmed and further work was required with mainstream schools to understand costs.
- Finally, officers drew attention to Paragraph 31, which outlined the next steps for the Autumn term.

During the discussion, points included:

- Members queried if placement funding would increase in line with inflation and actual cost, to which officers clarified that the review was looking at having a Primary Need element which would focus on banding descriptors, and then a Placement element which would recognise the increase of costs. Thus, ensuring a more flexible approach that would stay fit for purpose within the economic climate.



- Members welcomed the review, thanked officers for their hard work, and noted their anticipation of the results of the consultation in due course.

Following which, it was:

**Resolved:**

**The Schools Forum:**

- a. **Noted the update and next steps for the EHCP Top-Up Review.**
- b. **Considered the proposed principles for consultation with stakeholders on a funding mechanism for EHCP Top-Ups.**

46 **Confirmation of Dates for Future Meetings**

The date of the next meeting of the Schools Forum was confirmed as Thursday 12 December 2024 at 1.30pm and was scheduled to be held at County Hall, Trowbridge.

Future meeting dates were confirmed as below:

23 January 2025 – 1.30pm

13 March 2025 – 1.30pm

12 June 2025 – 1.30pm

47 **Urgent Items**

There were no urgent items.

(Duration of meeting: 1.30 - 3.40 pm)

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

Press enquiries to Communications, direct line 01225 713114 or email  
[communications@wiltshire.gov.uk](mailto:communications@wiltshire.gov.uk)

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# Agenda Item 6

## Schools Forum (SF)

### School Funding and SEN Working Group (SFWG)

#### MS TEAMS MEETING

28th November 2024

#### Minutes

**Present:** Marie Taylor (Chair), (Finance, local authority ((LA)), Grant Davis (Finance, LA), Liz Williams (HNB Sustainability Finance Lead); Ben Stevens (HNB Sustainability Strategic Lead) Kai Muxlow (Commissioning, LA) Lisa Percy (Chair of SF / Hardenhuish), John Hawkins (Teacher / Governor rep), Graham Shore (Deputy Chair SF / Holy Trinity), John Read (PHF maintained rep, Lyneham Primary) Nicola Whitcombe (Springfields Academy representing Special academies), Adam Smith (Chilmark, PHF representing maintained small schools.)

**Apologies:** Georgina Keily-Theobald (Downland) Kathryn Davis (Director, Education & Skills); Lisa Fryer (HOS, SEN & Inclusion)

1.	<b>Welcome and Apologies</b>  MT welcomed the group to the virtual meeting.	
2.	<b>Minutes</b>  There were no outstanding actions.	
3.	<b>Matters Arising</b>  MT updated the group on some relevant points from a DfE regional meeting earlier this week.  Minimal changes to the formula and approach and marginal increase for schools. The DfE received a lot of complaints from the group around the increases in funding and lateness of the guidance and allocations which was due to the general election outcome. NI grant - more details to be received in December or early in the new year similar methodology but looking at mainstream schools with resource spaces who of course have higher staff ratios which is helpful. Notional SEN no changes for 25/26 but in future the DfE are looking at what schools might be asked to do with this funding. Statutory override for local authorities with the DSG deficit no updates however the DfE are working with the MHCLG and the treasury on the future of this arrangement. The DfE confirmed that the safety valve mechanism was not confirmed into the future, but we know that £895 million has been ring fenced to support local authorities with high needs block deficits no detail available as yet. There was also discussion round section 19 medical needs peoples and recharging schools and excluded people recharging. A question was asked about the early years NI insurance grant and no detail was available. The DfE were publishing something “hopefully soon.”	
4.	<b>Schools Funding (DSG) Budget Monitoring Report (MT)</b>  MT shared her report & appendices – highlights, underspends in EY due to demand and Schools block small underspend offsets the HNB pressures. HNB pressures in line with demand for services and rising demand patterns – forecast deficit reserve balance to	

	<p>£66.233m at the end of the financial year higher than the SV agreement forecast of £51.027m and an increase since the last report of £4.959m.</p> <p>BS was able to update that the DfE have confirmed that our voluntary revised plan can be submitted by 11th of December - the DfE advisor has committed to feedback when we submit and wanted to confirm that this was not an enforced plan as other local authorities due as part of enhanced monitoring.</p>	
5.	<p><b>School block transfer (LW)</b></p> <p>LW presented the report which included detailed feedback from the Right Choice consultation. There was a lively discussion around some of the feedback from schools around the consultation process fed into via WASSH colleagues and from the primary sector. LW agreed to take all feedback on board and reminded the group that clarity had been provided both in January and there had been a full report to Schools Forum in June confirming the intention to consult on a 1% transfer.</p> <p>One of the items raised was that DfE policy had changed in relation to whether the council can still submit a request without the agreement of Schools Forum? There was a question as to whether the local authority would still choose to submit a disapplication without the support of schools. LW explained that we were still in a DfE process and the local authority could still choose to submit a disapplication but could not make a transfer unless the Secretary of State agrees and the Secretary of State will take into account schools forum views.</p> <p>JR queried the democratic process LW confirmed the LA was still in the middle of the democratic process so is not in a position to decide what the actions will be. JR pointed out that the majority of schools have supported the transfer but not the full 1% agreed and that a level of transfer is absolutely vital but asked who would make the decision? LW confirmed the process was Schools Forum then HN Sustainability Board, a recommendation would be made from the Board to Cabinet.</p> <p>LW confirmed that the DfE are expecting us to submit a request for a 1% block transfer, in line with the Safety Valve agreement, but we want to take the views of schools seriously before making a final decision on how to proceed. The responses to the consultation have been helpful; nothing surprising in there in the feedback from schools. LP said this was a historic deficit which gained momentum and appreciated it's a very difficult position. The local authority acknowledges the impact on schools and that action is needed.</p> <p>LP asked do we know when the funding allocation for 25/26 is due? LW confirmed we were expecting provisional allocations today. LW confirmed that the DfE date for submitting a disapplication request was the 18th November and therefore this had been submitted because we were advised by the DfE that we had to submit it in order to later be able to amend it following the Schools Forum discussion.</p> <p>LW agreed to group recommendations to breakdown questions 1A 1B &amp; 1C by primary and secondary sector and also further by the size of school.</p> <p>JR requested more information on the SEMH plans within the safety valve program he appreciates that authority capacity is stretched and it's an enormous challenge. LW confirmed it's a good question arising from information shared at the PHF briefing and WASSH conference. She took lots of questions and was still looking at the responses, the SEN inspection had taken time away from officers, but agreed we do need to start sharing updates of progress.</p> <p>JR said schools need more information to make the decisions and it knocks the confidence of head teachers LW confirmed we're in the early stages of the plan, demonstrating outcomes is difficult but we will need to have some specific communications to demonstrate the impact. It's a big system and a slow change and we need to demonstrate where we are making that impact.</p> <p>LP confirmed secondary teachers were feeding back that they had not seen evidence of</p>	

	<p>the benefits and would welcome this. BS confirmed that he felt there had been a lot of communication around elements of the plans he felt SENCOs were aware of MISAs but appreciated that head teachers may not be. LP said she didn't feel that was the case as her SENCO was not aware but some comms around the plans would be welcome. Officers took this as an action.</p> <p>AS raised that schools with high balances are not helpful when we are looking at a position of such pressure and suggested school budgets should be looked at with regard to who's got huge carry forwards AS's view is that the impact of a SB transfer on smaller schools is proportionately higher. LW confirmed we're not able to take school balances into account as any adjustment to the block must be made on in year funding not historical reserves as per the DfE regs. Actions relating to the Schools Forum discussion in October on school balances would be taken forward separately.</p> <p>LW confirmed we should have the indicative funding by Schools Forum date and be able to do some early modelling. LP asked if we can have any information before Schools Forum LW confirmed the deadline for papers is the Tuesday 3<sup>rd</sup> December so we should be able to produce papers as long as the guidance is received today. GD confirmed he would be able to run through the modelling using 2023 census data so it would be in draft and would only be in a position to confirm fully in January, but we will be able to make in principal decisions for the December meeting</p> <p>MT thanked the group for their input and asked would it be useful to show the process in a flowchart showing the various stages of consultation so that there's no further misunderstanding? Agreed to be useful.</p>	LW BS GD
6.	<p><b>De delegation Report (GD)</b></p> <p>GD shared his report which included responses from the consultation 46 primary schools and 4 secondary schools and overwhelming support to continue to de-delegate from primaries. However, GD had had discussions with the secondary rep and they had all agreed to vote to procure their own School Improvement as a collective. It was felt they could get better value as did the local authority from purchasing support from elsewhere. There were no comments from the group. GD confirmed that de-delegation can be separated between primary and secondary maintained schools.</p>	
7.	<p><b>Growth Fund (GD)</b></p> <p>GD presented his report. With a general dipping in the birth rate, we don't have any new schools generally but, sometimes we have areas of housing development and obviously the infant class size regs mean that sometimes additional funding is required from the growth fund. In addition, sometimes there is a requirement to expand certain schools to ensure capacity is available and this needs to be supported. Nicola had to leave the meeting at this point. Confirmed Wiltshire had never set up a falling rolls fund and the group agreed that this was still the feeling from members as this would need to be top sliced from school block. Wiltshire's falling rolls funding through the DfE's calculations of our 'Growth' allocation helps to fund the SB transfer. JR queried the DfE thoughts around the falling rolls fund. GD confirmed that it was introduced as an option around 10 years ago. Take up nationally by LA's has been minimal, and Schools Forum have consistently agreed that establishing a Falling Rolls Fund has not been supported in Wiltshire.</p>	

	<p>Almost all Primary schools are witnessing a drop in numbers due to the birth rate falling. Colleagues from the LA are meeting with the DfE next week to discuss the viability of some schools and it's a wider conversation where schools are in multi academy trust. One option is to take PAN's down to more appropriate levels.</p> <p>MT explained that the DfE have made it clear that schools are shrinking we are not able to convert space into resource spaces for example and then ask them for basic need funding a couple of years later. GD confirmed that small schools are protected by sparsity funding now as part of the NFF which has really helped small schools.</p>	
8.	<p><b>2025/26 Schools funding (GD)</b></p> <p>GD presented his report - the 2025/26 values are expected today  LW said rolling all those grants into the AWPU impacts the value of the 1% in monetary terms and we need to consider the cash value of that 1% and whether it needs to be 1% or the cash value based upon last years 1% cash figure.  LP said the number of schools impacted by the MFG might be worth modelling up. GD said once the financial modelling is completed, we can consider more fully in the January meeting.</p>	GD LW
9.	<p><b>AOB</b></p> <p>GD brought back to the group a piece of work he had done on revenue balances of maintained schools with historically large balances for more than five years and shared that some have plans to use the balances  There was considerable discussion in the group with strong views that saving revenue for capital was not appropriate particularly whilst there were lots of schools with a disadvantaged learner gap. The group was very interested in clawbacks however we would have to do a clawback arrangement with a separate arrangement for maintained and Academy schools and this would be likely, to be inequitable - officers agreed to look at a working group to look at the schools financial data with some of the performance data and bring their conclusions back to Schools Forum.</p>	MT GD
10	<p><b><i>Date and Time of next Meeting</i></b></p> <p>SFWG 8.30am – 14<sup>th</sup> January 2025</p> <p>Schools Forum 1.30pm 23rd January 2025</p> <p>This is planned as a <b>face to face</b> meeting.</p>	

### Glossary

RB – Resource Base

SV – Safety Valve

DfE – Dept for Education

LGA – Local Government Org

ISS – Independent Special Schools

EY – Early Years

LA – Local Authority

SoS – Secretary of State

**Schools Forum Funding & SEN Working Group**  
**28 November 2024**

**Schools Forum**  
**12 December 2024**

**DEDICATED SCHOOLS BUDGET – BUDGET MONITORING 2024/25**

**Purpose of the Report**

1. To present budget monitoring information against the Dedicated Schools Grant (DSG) for the financial year 2024-25 as at Quarter 2 2024/25 (September 2024).

**Main Considerations**

2. Appendix 1 and 2 to this report outlines the budget monitoring summary as at the end of the first quarter of the financial year including activity information for demand driven budgets.
3. An overspend of £14.942 million is currently forecast against the overall schools budget after the transfer of £28.254 million from the deficit reserve, agreed at budget setting and in line with the Council's Safety Valve agreement. This is an adverse movement of £5.049m compared with the Q1 forecast. This movement is accounted for by a reduction in the early years block underspend of £2.2m and an increase of £2.8m in the projected overspend against the high needs block. The overspend against the high needs block is now projected to be £17.489m.
4. 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 31<sup>st</sup> March 2026.
5. Wiltshire's planned transfer from the DSG reserve was agreed as part of the budget setting process and was £28.254million. The overspend forecast of £14.942 million on the grant plus this transfer from reserves mean the overall estimated DSG pressure in 2024/25 is therefore £43.196m.
6. Table 1 below shows the forecast variances by individual DSG block.

	DSG Allocation from the £m	Wiltshire Transfers £m	Current Annual Budget £m	Forecast Outturn £m	Forecast Outturn Variance £m	% Variance
Early Years Block	52.205	0.180	52.385	50.074	(2.311)	-4%
Schools Block	364.468	(2.000)	362.468	362.391	(0.077)	0%
High Needs block	74.445	1.984	104.683	122.172	17.489	17%
Central Block	2.644	(0.164)	2.480	2.320	(0.160)	-6%
<b>Overall</b>	<b>493.761</b>	<b>0.000</b>	<b>522.015</b>	<b>536.957</b>	<b>14.942</b>	<b>3%</b>
<b>Planned transfer to DSG reserve (overspend)</b>					<b>28.254</b>	
<b>Net in year forecast movement to the DSG reserve</b>					<b>43.196</b>	

**Early Years Budgets (Budget £54.385M, forecast variance (2.311M))**

7. The early years budgets are projected to underspend by £2.311m. With effect from 1 April 2024, the DfE introduced an extension of the entitlements to 9 months to 2 year olds and universal 2 year old offer, the budget is now significantly higher based on the DfE's introductory assumptions on take up. Parental take up of the offer is largely unknown and therefore forecast variances could still vary from this report.

**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	10,880	9,260	-1,620	30.083	27.739	(2.344)
2-year-olds	727	642	-85	2.840	2.739	(0.102)
2-year-olds with working parents	2,171	2,312	141	9.256	9.450	0.194
Under 2-year-olds	1,311	1,369	58	7.513	7.513	0.000
ISF	374	374	0	1.143	1.143	0.000
	hours	hours	hours			

\*PTE = part time equivalent learners

8. The local authority has a duty of sufficiency in this sector and continues to work closely with providers to support through these challenging times of rising costs and a highly competitive recruitment marketplace.

**Schools Budgets (Budget £362.468M, forecast variance (£0.077M))**

9. The minimal forecast underspend on schools relates to central teams and is helping to offset the overall pressure on the DSG.

**High Needs Budgets (Budget £104.683M, forecast variance £17.489M)**

10. The High Needs budgets are projected to overspend by £17.489m. For this financial year, the budgets have been increased by the planned drawdown from the DSG reserve. For high needs this is £28.254m. This facilitates improved budget monitoring, setting targets and measuring success in recovery planning.

11. 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.

**Table 3 - Number of EHCP Learners**

	Children with an EHCP in Wiltshire	Prior Year Data (2023-24)	Prior Year Data (2022-23)
As at September 2024	6,060		
Estimate as at 31 <sup>st</sup> March 2025 (based on estimates for SV Plan)	6,399	5,605	4,762
Annual movement	<b>794</b>	<b>843</b>	<b>391</b>
% Movement	12%	15%	8%

12. The biggest pressures are in mainstream provision and independent sector provision. The forecast takes into account the additional capacity delivered within Wiltshire special schools and resource bases. The number of Education Health and Care Plans is higher than forecast and this pressure is impacting on spend across all high needs provision. The number of EHCPs at the end of quarter two in 2024/25 is 6,060; an increase of 758 plans on the same quarter last year.



13. Full detail on all activity data forecasts can be found at Appendix 2 and 3, highlights of the demand in FTE are included in Table 4 below.

**Table 4 - High Needs Learners activity**

	Budgeted Volume FTE	Actual Volume FTE	Volume variance FTE	% change in volume	Actual unit rate
<b>Wiltshire School Provision</b>					
Special School Places	1,063.75	1,063.75	0	0%	£9,995
Special School Top Ups	1,341.88	1,169.01	(173)	-13%	£14,726
ELP Places	343.61	343.61	0	0%	£5,920
ELP Top Ups	522.53	569.51	47	9%	£5,380
Resource Base Places	478.56	478.56	0	0%	£6,058
Resource Base Top Ups	605.22	572.45	(33)	-5%	£7,347
Secondary Resource Place Top Ups	37.49	54.77	17	46%	£6,874
Named Pupil Allowance - Prim	900.68	1,159.95	259	29%	£6,393
Named Pupil Allowance - Sec	506.63	773.30	267	53%	£6,393
Additional Top Up Support	171.62	305.50	134	78%	£16,279
Transition Support Funding	313.25	352.90	40	13%	£3,551
<b>Independent / External Provision</b>					
Independent Special School Fees	329.18	382.76	54	16%	£74,128
6th Form	719.63	796.27	77	11%	£12,025
Wiltshire College Places	436.33	436.33	0	0%	£6,000
Inter Authority Recoupment	260.84	328.90	68	26%	£16,660
Alternative Provision & DP (SEN)	357.75	428.73	71	20%	£14,985

**Table 4 - High Needs Learners price variance**

	Budgeted Price Per annum	Actual Price (Ave) Per annum	Price variance Per annum	% change in price
<b>Wiltshire School Provision</b>				
Special School Places	10,000	10,000	0	0%
Special School Top Ups	13,509	14,726	1,217	9%
ELP Places	6,000	6,000	0	0%
ELP Top Ups	5,281	5,380	99	2%
Resource Base Places	6,000	6,000	0	0%
Resource Base Top Ups	6,855	7,347	492	7%
Secondary Resource Place Top Ups	7,169	6,874	(295)	-4%
Named Pupil Allowance - Prim	5,790	6,964	1,174	20%
Named Pupil Allowance - Sec	5,790	5,491	(299)	-5%
Additional Top Up Support	12,617	16,279	3,662	29%
Transition Support Funding	4,000	3,551	(449)	-11%
<b>Independent / External Provision</b>				
Independent Special School Fees	62,842	74,113	11,271	18%
6th Form	12,203	12,025	(178)	-1%
Wiltshire College Places	6,000	6,000	0	0%
Inter Authority Recoupment	15,279	16,850	1,571	10%
Alternative Provision & DP (SEN)	12,617	14,985	2,368	19%

**Central School Services Budgets (Budget £2.320m, forecast variance (£0.160m))**

14. The small forecast 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**

15. The deficit reserve brought forward of £28.706 million is increased by the negative early years block adjustment of £1.030 million. The planned drawdown of £28.254m,

forecast overspend of £14.942m and forecast Safety Valve payments of £6.700m will take the reserve into a forecast deficit position of £66.233 million.

**Table 5 - DSG Reserve**

	<b>Safety Valve Agreement £m</b>	<b>Total 24/25 FY £m</b>
Balance Brought Forward from 23/24	29.447	28.706
Early Years Adjustment (prior year)	0.000	1.030
Planned drawdown from reserve	28.280	28.254
Actual Variance 24/25	0.000	14.942
In year Safety Valve payments	(6.700)	(6.700)
<b>Balance CFWD 2024/25</b>	<b>51.027</b>	<b>66.233</b>

16. The Council has a Safety Valve agreement in place and performance against that agreement is monitored on a quarterly basis by the Department for Education. Additional actions will need to be put into place in order to ensure that the Council can still deliver on the agreement to achieve in year balance against its high needs budgets by April 2029. It has been agreed with the DfE that an updated plan will be submitted by 11 December reflecting the updated EHCP forecast and increased mitigations to achieve in year balance.
17. A statutory override for DSG deficits is currently in place until the end of the 2025/26 financial year. The statutory override, whilst in place, protects the council from having to make good any DSG deficit from its own reserves. As it currently stands, local authorities will need to demonstrate their ability to cover DSG deficits from their available reserves from 2026/27 onwards unless the override is extended. This continues to present a significant financial risk to the Council.

### **Proposals**

18. Schools Forum is asked to note the forecast budget monitoring position including the balance on the DSG reserve at the end of September 2024 together with the report later in the agenda on SEND Transformation.

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**Appendix 1 – Schools Budget Forecast Position as at 30th September 2024**

a	b	c	d = (c-b)	e = (d/b)	f	d = (c-b)	g
Service Area	Current Annual Budget £m	Period 6 £m	Period 6 Forecast £m	Period 6 Forecast %	23/24 Outturn Variance	August forecast variance £m	Budget Move- ment from Previous
Three to Four Year Olds EY Entitlement Funding	30.083	27.739	(2.344)	-7.79%	(0.946)	(2.344)	0.000
Two Year Olds EY Entitlement Funding	2.840	2.739	(0.102)	-3.58%	0.045	(0.102)	0.000
Two Year Olds with Working Parents EY Entitlement Funding	9.256	9.450	0.194	2.09%	0.000	0.194	0.000
Under Two Year Olds EY Entitlement Funding	7.513	7.513	0.000	0.00%	0.000	0.000	0.000
Early Years Inclusion Support Fund	1.143	1.143	0.000	0.00%	(0.106)	0.000	0.000
Early Years Pupil Premium & DAF	0.691	0.691	0.000	0.00%	0.005	0.000	0.000
Early Years Central Expenditure	0.859	0.800	(0.058)	-6.81%	(0.161)	(0.049)	(0.010)
<b>Early Years Block</b>	<b>52.385</b>	<b>50.074</b>	<b>-2.311</b>	<b>-4.41%</b>	<b>-1.162</b>	<b>-2.301</b>	<b>-0.010</b>
Schools Budget Shares Primary & Secondary - Local Authority Schools	106.655	106.655	0.000	0.00%	0.000	0.000	0.000
Schools Budget Shares Primary & Secondary - Academy Schools	248.978	248.978	0.000	0.00%	0.000	0.000	0.000
Schools National Non Domestic Rates	3.692	3.692	0.000	0.00%	0.000	0.000	0.000
De-delegated services incl education functions (maintained schools only)	2.496	2.419	(0.077)	-3.09%	(0.189)	(0.059)	(0.018)
<b>Delegated &amp; De Delegated Total</b>	<b>361.821</b>	<b>361.744</b>	<b>-0.077</b>	<b>-0.02%</b>	<b>-0.189</b>	<b>-0.059</b>	<b>-0.018</b>
Growth Fund	0.647	0.647	0.000	0.00%	(0.028)	0.000	0.000
<b>Schools Block</b>	<b>362.468</b>	<b>362.391</b>	<b>-0.077</b>	<b>-0.02%</b>	<b>-0.218</b>	<b>-0.059</b>	<b>-0.018</b>
Special School Place Funding	10.632	10.632	0.000	0.00%	0.000	0.000	0.000
Resource Base (RB) Funding	2.899	2.899	0.000	0.00%	0.000	0.000	0.000
Enhanced Learning Provision (ELP) Funding	2.034	2.034	0.000	0.00%	0.000	0.000	0.000
<b>High Needs Block Place funding (all schools)</b>	<b>15.565</b>	<b>15.565</b>	<b>0.000</b>	<b>0.00%</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
Named Pupil Allowances (NPA)	8.148	12.360	4.212	51.69%	1.022	4.212	0.000
Special School Top-Up	18.128	17.215	(0.912)	-5.03%	1.129	(0.912)	0.000
Resource Base (RB) Top-Up	4.149	4.206	0.057	1.37%	0.067	0.057	0.000
Secondary Resourced Base (RB) Top-Up	0.269	0.377	0.108	40.07%	0.000	0.108	0.000
Enhanced Learning Provision (ELP) Top-Up	2.760	3.064	0.305	11.04%	(0.195)	0.294	0.010
Transitional Support (TSP) payments	1.253	1.253	0.000	0.00%	(0.318)	0.000	0.000
Additional Top-Up Support	2.165	4.973	2.808	129.67%	0.000	2.238	0.570
Secondary Alternative Provision Funding	3.011	3.011	0.000	0.00%	(0.476)	0.000	0.000
Non Wiltshire Pupils in Wiltshire Schools	0.000	0.000	0.000	0.00%	(0.031)	0.000	0.000
<b>Devolved to Maintained &amp; Top Ups (all schools)</b>	<b>39.882</b>	<b>46.458</b>	<b>6.577</b>	<b>16.49%</b>	<b>1.199</b>	<b>5.997</b>	<b>0.580</b>
Wiltshire College Places	2.618	2.618	0.000	0.00%	0.000	0.000	0.000
Wiltshire Pupils in Non Wiltshire Schools	3.985	5.479	1.494	37.49%	0.853	1.494	0.000
Post-16 Top-Up	8.782	9.575	0.794	9.04%	0.461	0.584	0.210
Independent & Non-Maintained Special Schools	20.692	28.373	7.682	37.12%	2.889	5.946	1.735
SEN Alternative Provision, Direct Payments & Elective Home Education	4.514	6.425	1.911	42.34%	2.639	1.911	0.000
Education Other than at School (EOTAS)	0.529	0.507	(0.022)	-4.25%	(0.105)	(0.014)	(0.009)
<b>Funding for Places outside Schools</b>	<b>41.120</b>	<b>52.978</b>	<b>11.858</b>	<b>28.84%</b>	<b>6.736</b>	<b>9.921</b>	<b>1.936</b>
High Needs in Early Years Provision	0.819	0.779	(0.039)	-4.80%	(0.308)	(0.039)	0.000
Speech & Language	0.560	0.560	0.000	0.00%	(0.205)	0.000	0.000
Support for AP, SEN & Inclusion	6.737	5.831	(0.906)	-13.44%	(2.231)	(1.242)	0.337
<b>Commissioned AP &amp; SEN Support Services</b>	<b>8.116</b>	<b>7.171</b>	<b>-0.945</b>	<b>-11.64%</b>	<b>-2.744</b>	<b>-1.282</b>	<b>0.337</b>
<b>High Needs Block</b>	<b>104.683</b>	<b>122.172</b>	<b>17.489</b>	<b>16.71%</b>	<b>5.190</b>	<b>14.636</b>	<b>2.853</b>
Section A - Central Licences	0.511	0.468	-0.043	-8.36%	(0.000)	-0.043	0.000
Section B - Central Provision (Former ESG, Admissions, Schools Forum)	1.781	1.651	-0.130	-7.29%	(0.063)	-0.152	0.023
<b>Central Provision within Schools Budget</b>	<b>2.292</b>	<b>2.119</b>	<b>-0.173</b>	<b>-7.53%</b>	<b>-0.063</b>	<b>-0.195</b>	<b>0.023</b>
Section C - Education Services to CLA, Child Protection in Schools & Early Years & Prudential Borrowing	0.188	0.201	0.013	6.87%	(0.103)	0.013	0.000
<b>Historic Commitments</b>	<b>0.188</b>	<b>0.201</b>	<b>0.013</b>	<b>6.87%</b>	<b>-0.103</b>	<b>0.013</b>	<b>0.000</b>
<b>Central School Services</b>	<b>2.480</b>	<b>2.320</b>	<b>-0.160</b>	<b>-6.44%</b>	<b>-0.166</b>	<b>-0.182</b>	<b>0.023</b>
<b>PLANNED DRAWDOWN FROM DSG RESERVE AT YEAR END</b>	<b>-28.254</b>	<b>-28.254</b>	<b>0.000</b>	<b>0.00%</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>
<b>Total Schools Budget</b>	<b>493.761</b>	<b>508.703</b>	<b>14.942</b>	<b>3.03%</b>	<b>3.644</b>	<b>12.095</b>	<b>2.848</b>

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

**Appendix 2 - Variance Analysis**

h	i	j	k = (j-i)	l = (k/i)	m	n	o	n
Volume analysis	Budgeted Activity FTE	Period 6 Activity FTE	Period 6 Variance FTE	%	23/24 Outturn Volume	Volume movement from Previous Report	2024/25 Average Prices	2023/24 Average Prices
Three/Four Year Olds	10,880	9,260	(1,620)	-15%	9,491	-	£5.21	£4.68
Two Year Olds	727	642	(85)	-12%	722	-	£7.48	£5.75
Two Year Old With Working	2,171	2,312	141	6%	-	-	£7.17	£0.00
Under 2 Year Olds	1,311	1,369	58	4%	-	-	£9.63	£0.00
ISF	374	374	0	0%	289	-	£3,059	£3,059
<b>Early Years Block</b>	<b>15,463</b>	<b>13,957</b>	<b>(1,506)</b>	<b>-10%</b>	<b>10,502</b>	<b>0</b>	<b>£828</b>	<b>£828</b>
<b>ACTIVITY DRIVER DATASET</b>	<b>15,463</b>	<b>13,957</b>	<b>(1,506)</b>	<b>-10%</b>	<b>10,502</b>	<b>0</b>	<b>£0.53</b>	<b>£0.53</b>
Sp Sch Place Funding	1,064	1,064	0	0%	911	28	£9,995	£10,000
RB Funding	479	479	0	0%	413	10	£6,058	£6,000
ELP Funding	344	344	0	0%	295	5	£5,920	£6,000
<b>High Needs Block</b>	<b>1,886</b>	<b>1,886</b>	<b>0</b>	<b>0%</b>	<b>1,619</b>	<b>34</b>	<b>£6,393</b>	<b>£5,838</b>
NPA	1,407	1,933	526	37%	1,582	27	£14,726	£13,198
Special School Top-Up	1,342	1,169	(173)	-13%	1,020	12	£7,347	£7,244
RB Top-Up	605	572	(33)	-5%	536	3	£6,874	£7,244
Secondary RB Top-Up	37	55	17	46%	0	0	£5,380	£5,204
ELP Top-Up	523	570	47	9%	581	11	£3,551	£4,000
TSP	313	353	40	13%	234	3	£16,279	N/A
Additional Top-Up Support	172	305	134	78%	-	8	-	-
<b>High Needs Block</b>	<b>4,399</b>	<b>4,957</b>	<b>558</b>	<b>13%</b>	<b>3,954</b>	<b>2</b>	<b>£9,372</b>	<b>£8,359</b>
Wiltshire College Places	436	436	0	0%	386	0	£6,000	£6,000
Non Wiltshire Schools	261	329	68	26%	266	0	£12,025	£12,125
Post-16 Top-Up	720	796	77	11%	666	2	£74,128	£67,145
Ind & Non-Maint Sp Sch	329	383	54	16%	302	20	£14,985	£13,779
SEN AP, DP & EHE	358	429	71	20%	673	5	-	-
<b>High Needs Block</b>	<b>2,104</b>	<b>2,373</b>	<b>269</b>	<b>13%</b>	<b>2,293</b>	<b>27</b>	<b>£22,325</b>	<b>£19,460</b>
<b>High Needs Block</b>	<b>8,389</b>	<b>9,216</b>	<b>827</b>	<b>10%</b>	<b>7,866</b>	<b>9</b>	<b>£13,256</b>	<b>£12,292</b>

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



**Wiltshire Council**

**School Funding Working Group 28 November 2024**

**Schools Forum 12 December 2024**

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## **Dedicated Schools Grant Consultations 2025-26**

### **Purpose of the Report**

1. To update Schools Forum with the results of the recent Autumn consultations relating to.
  - De-delegation of central services - Maintained Schools only
  - De-delegation in support of former LAMB grant – Maintained Schools only

The consultation regarding the transfer of funds from the Schools Block to the High Needs Block for all schools is subject to a separate report.

2. The survey results will help Schools Forum decision making for the 2025-26 year.

### **De-Delegation of Central Services Consultation Responses**

3. Under the funding formula, all funding should be fully delegated to all schools, however certain centrally provided services can be 'de-delegated' for maintained schools only, with approval of the respective maintained Schools Forum representatives.
4. The funding regulations require that all maintained schools are consulted and given the opportunity to express their preferences for the services which can be de-delegated. The services being consulted as part of the 2025-26 consultation process were:

- Free School Meal Eligibility Checks
- Access Budget Planning Software Licence
- Trade Union Facilities Costs
- Maternity Costs
- Ethnic Minority Achievement Service
- Traveller Education Service
- Behaviour Support Service

5. The consultation regarding de-delegation took place through Right Choice during the Autumn term, to enable maintained schools to consider their responses. The consultations closed on 15 November 2024. Schools Forum members can see the questions and results of the consultation, detailed in Appendix 1.
6. A total of 50 responses were received, 46 responses from Primary Schools and 4 from Secondary Schools. This compares more favourably than the last year where 25 responses were received. This is a significantly higher response rate than in previous year however, it is widely known that the majority of maintained schools rely on their Schools Forum colleagues to make the appropriate decisions on their behalf.
7. The results received were overwhelmingly in favour of retaining the de-delegated services in both the Primary and Secondary schools which will inform eligible Schools Forum representatives when voting on the school budgets for 2025-26.

## De-Delegation – School Improvement Services 2024-25 (LAMB Grant)

8. The Local Authority Monitoring and Brokering (LAMB) Grant had been provided to local authorities since 2017, to help fulfil their core improvement activities. Funding was based on the number of maintained schools and the Department for Education (DfE) reduced the grant by 50% in 2022-23 and removed it fully in 2023-24.
9. Local authorities can fund improvement services through either de-delegation or on a traded basis. Historically, maintained schools' members of Schools Forum agreed to fund the loss of the LAMB grant through de-delegation and for the 2024-25 year, agreed to fund the full removal of the LAMB Grant.
10. In order to provide Schools Forum with a steer for the 2025-26 year, a local consultation was arranged to provide maintained schools with the opportunity to express their preference regarding continuing a contribution to support the loss of LAMB Grant funding. A copy of the consultation is held at Appendix 2.
11. The consultation was open to all maintained schools and a total of 35 responses were received (up from 14 responses in 2024-25), which can be broken down as follows.
  - 4 secondary schools
  - 31 primary schools
12. Of the schools that responded, the results can be summarised as below.

All Schools						
Option	Impact	1st Choice	2nd Choice	3rd Choice	4th Choice	5th Choice
Schools don't fund any loss of LAMB	Reduction in Services - €453k	10	1	0	0	24
Schools fund 50% loss of LAMB	Reduction in Services - €229.5k	1	10	0	24	0
Schools fund 75% of LAMB	Reduction in Services - €114.8k	1	0	33	0	1
Schools fund 87.5% of LAMB	Reduction in Services - €57.3k	1	23	0	11	0
Schools fund 100% of LAMB	Existing service maintained	22	1	2	0	10

Primary						
Option	Impact	1st Choice	2nd Choice	3rd Choice	4th Choice	5th Choice
Schools don't fund any loss of LAMB	Reduction in Services - €453k	6	1	0	0	24
Schools fund 50% loss of LAMB	Reduction in Services - €229.5k	1	6	0	24	0
Schools fund 75% of LAMB	Reduction in Services - €114.8k	1	0	29	0	1
Schools fund 87.5% of LAMB	Reduction in Services - €57.3k	1	23	0	7	0
Schools fund 100% of LAMB	Existing service maintained	22	1	2	0	6

Secondary						
Option	Impact	1st Choice	2nd Choice	3rd Choice	4th Choice	5th Choice
Schools don't fund any loss of LAMB	Reduction in Services - €453k	4	0	0	0	0
Schools fund 50% loss of LAMB	Reduction in Services - €229.5k	0	4	0	0	0
Schools fund 75% of LAMB	Reduction in Services - €114.8k	0	0	4	0	0
Schools fund 87.5% of LAMB	Reduction in Services - €57.3k	0	0	0	4	0
Schools fund 100% of LAMB	Existing service maintained	0	0	0	0	4

13. This data will inform the decision making around the 2025-26 budget for school improvement services. The key points from the consultation are.
- ✓ 22 of the 35 respondents supported continuing to fund at the 100% level
  - ✓ 22 of the 31 primary school respondents supported continuing to fund at the 100% level
  - ✓ Only 6 primary schools set their first preference as being not to fund at all
  - ✓ All 4 of the secondary schools have expressed a preference to source their own school improvement support.
14. The DfE have confirmed that any commitment to fund School Improvement services will come under the de-delegation methodology and will be subject to annual agreement.
15. As with the centrally de-delegated services, it is widely recognised that the majority of maintained schools rely on their Schools Forum colleagues to make the appropriate decisions on their behalf.
16. It is allowable within the funding regulations to differentiate the de-delegation for School Improvement services between primary and secondary schools. The value of de-delegation for school improvement services for secondary schools in 2024-25 was £67,284 and therefore the remaining £391,716 related to primary schools.

## **Proposals**

17. Schools Forum is asked to note the local consultation responses in relation to the schools delegated budget for the 2025-26 financial year.
18. Schools Forum is asked to make 'in principle' decisions in accordance with the consultation responses as below.
- **De-delegation** of central services for Maintained schools
    - FSM – primary and secondary
    - Licences – primary and secondary
    - Trade Union – primary and secondary
    - Maternity – primary and secondary
    - Ethnic Minority Support – primary only
    - Traveller Education – primary only
    - Behaviour Support – primary only
  - **De-delegation** of funding to support school improvement services for maintained primary schools. To continue to fund at the rate of 100% loss in funding for primary schools only (£391k), recognising that secondary schools would prefer to source their own support.

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## Appendix 1 – De-Delegation Consultation

### Questions

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

### Results

A summary of the results is set out below.

PRIMARY	FSM	Licences	Trade Union	Maternity	EMAS	Traveller Education	Behaviour Support
Delegate	0	0	1	1	6	6	2
De-delegate	46	46	45	45	40	40	44
<b>Total</b>	<b>46</b>	<b>46</b>	<b>46</b>	<b>46</b>	<b>46</b>	<b>46</b>	<b>46</b>

SECONDARY	FSM	Licences	Trade Union	Maternity	EMAS	Traveller Education	Behaviour Support
Delegate	0	0	0	0	N/a	N/a	N/a
De-delegate	4	4	4	4	N/a	N/a	N/a
<b>Total</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>N/a</b>	<b>N/a</b>	<b>N/a</b>



## Appendix 2 – Consultation – Loss of LAMB Grant

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

<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	£16.69	
Schools fund 87.5% of LAMB	Reduction in Services - £57.4k	£401,625	£19.48	
Schools fund 100% of LAMB	Existing service maintained	£459,000	£22.26	

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Wiltshire Council

School Funding Working Group 28 November 2024

Schools Forum 12 December 2024

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## Allocation of Funding for Pupil Growth 2025-26

### Purpose of the Report

1. To seek agreement on the methodology for allocating funding for pupil growth from the school's block growth fund in 2025-26.

### Background

2. Wiltshire currently operates a growth fund and Schools Forum agreed to a number of criteria for the allocation of funding for pupil growth in previous years. The current growth fund criteria have previously been confirmed as being fully compliant by the Department for Education (DfE).
3. The methodology to calculate growth funding under the National Funding Formula (NFF) was introduced for the 2019 to 2020 financial year and has remained the same for the 2025 to 2026 financial year. This means that funding will be based on the observed differences between the primary and secondary number on roll in Wiltshire between the October 2023 and October 2024 school censuses.
4. Following the DfE's consultation in 2022, the School Funding Operational Guidance for 2025-26 has been updated to confirm that the Growth Fund can only be 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.
5. It was further confirmed that the Growth Fund cannot be used to support
  - schools in financial difficulty
  - general growth due to popularity.

### Funding Methodology

6. Growth allocations for 2025-26 will continue to be based on pupil data from the October 2023 and October 2024 censuses.
7. Funding is allocated to local authorities based on the actual growth in pupil numbers they experienced over the previous year which ensures that over time local authorities are funded on the basis of the actual growth they experience (on a lagged basis), rather than being based upon historic spending decisions.
8. The DfE measure growth within local authorities at **middle layer super output area** (MSOA)<sup>1</sup> level. MSOAs are used as these are small enough geographical areas to detect 'pockets' of growth within local authority areas. Growth is measured by counting the increase in pupil numbers in each MSOA in the local authority between the October 2023 and October 2024 censuses. Only positive increases in pupil

numbers will be included, so positive growth in one area, and negative growth in another, will not be denied growth funding.

9. In Wiltshire, growth is measured by separating the county into 62 MSOA's with an average of 4 schools in each MSOA area.
10. For each local authority, the growth factor allocates:
  - **£1,570** for each primary 'growth' pupil (was £1,550, £1,520, £1,485, £1,455, £1,425, and £1,370 previously)
  - **£2,350** for each secondary 'growth' pupil, (was £2,320, £2,275, £2,220, £2,175, £2,130, and £2,050 previously) and
  - **£77,225** for each brand-new school that opened in the previous year. (was £76,195, £74,700, £70,800, £68,700, £67,000, and £65,000 previously)
11. The DfE do not expect local authorities to use these rates in their local arrangements for funding growth. The growth factor in the NFF is a proxy for overall growth costs at local authority level, and not at the level of individual schools.
12. All local authorities (LA's) generally allocate growth funding using a local arrangement as there is no national method adopted for allocating growth funding. Therefore, Schools Forum should continue to make decisions about growth funding locally as they do now.
13. The DfE consultation during the Summer of 2022, proposed options around the future for Growth funding and whilst no radical reforms have been implemented, it was recognised that awarding growth funding at a local level would continue to be appropriate in the future, with LA's being able to apply local knowledge and intelligence.

(The Wiltshire allocation for 2025-26 will be announced in December as part of the schools funding announcement.)

## **Main Considerations**

14. The growth funding forms part of the local authority's Schools Block of funding. For 2025-26, growth funding will be allocated to Wiltshire using the formulaic approach, based upon lagged growth data. With regard to allocating funding from the growth fund, the requirements are that:
  - a) can be used only for the purposes of supporting growth in pre-16 pupil numbers to meet basic need
  - b) to support additional classes needed to meet the infant class size regulations
  - c) to meet the costs of new schools
  - d) the fund must be used consistently for the benefit of both maintained schools and academies

- e) any funds remaining at the end of the financial year will form part of the overall DSG surplus or deficit balance.
  - f) local authorities will be required to produce criteria on which any growth funding is to be allocated. These should provide a transparent and consistent basis (with differences permitted between phases) for the allocation of all growth funding. The criteria should both set out the circumstances in which a payment could be made and provide a basis for calculating the sum to be paid
  - g) local authorities will need to propose the criteria and size for the growth fund to Schools Forum and gain its agreement on both the criteria and size of the fund before growth funding is allocated.
15. In addition to the above requirements, since 2024-25 year local authorities are required to provide growth funding where a school or academy has agreed with the local authority to provide an extra class to meet basic need in the area, using a minimum funding level equating to

**primary growth factor value (£1,570) × number of pupils × ACA**

16. The primary growth factor value will be used for all school types – recognising there is one teacher pay scale and that this funding is a minimum value.

### **Proposed Criteria**

17. The proposed criteria for funding pupil growth within the local Wiltshire funding formula in 2025-26 are as follows:

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

18. Schools receive funding in advance of pupils arriving in the school, based on the result of the pupil teacher ratio rounded up to the nearest next whole number. The PTRs used are 26.5:1 for KS1 & 27.5:1 for KS2.
19. The topped-up element to the next whole number is arrived at by multiplying the result by the salary of a teacher on the top point of the teacher's main scale 6 + on-costs. This element will apply until the first-year group has left the school or until the school is full (whichever occurs first).
20. In addition, the costs of a head teacher and 10 hours admin support will be available one "old" term before opening. 55% of the Lump Sum will be available two "old" terms before opening. In the first year of opening the school will also receive funding towards supplies and services comprising, 34% of the Lump Sum, 17% in the second year & 8.5% in the third year after opening. (The Lump Sum is proposed at the NFF rate for 2025-26).
21. New schools may also receive an estimate of the new pupil intake for the forthcoming academic year. This approach will be in place for the number of years equal to the number of year groups at the school.

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

22. Where a school is expanded to provide additional classes to meet 'basic need' for places identified by the LA, from the month of opening the additional class for the

remainder of the financial year only, the school will receive the relevant 12ths x 30 x relevant AWPU for each additional class. Where a full class may not be needed then the school would receive the relevant 12ths x estimate of increased September intake x relevant AWPU. The definition of “expanded” is that a building project or addition of a mobile classroom has taken place.

23. Having looked at the new requirement set by the DfE as detailed at paragraph 15, the Wiltshire criteria would be fully compliant, as the AWPU value is used which is greater than the *‘primary growth factor value’*.

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

24. This is payable to a Primary School with infant classes which is required to set up an additional class in the Autumn term as required by the infant class size regulations, and the school cannot accommodate all its additional Reception and Key Stage 1 pupils in classes of 30 or less, i.e., the total number of pupils in the 3-year groups exceeds a multiple of 30. Where the total increase in NOR between the two October census dates is greater than 13 and necessitates that an extra class would be required, then additional funding is allocated per additional class.
25. Schools Forum is required to consider and approve the above criteria for application in 2025-26.

#### **Falling Rolls Fund**

26. Local Authorities (LA) are able to set aside Schools Block funding to create a small ‘Falling Rolls’ 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.
27. Since 2024-25 the DfE allocates funding to LA’s based on both growth and falling rolls.
28. Falling rolls funding will be distributed on the basis of the reduction in pupil numbers that local authorities experience each year. Funding will be based on the observed differences between the primary and secondary number on roll between the October 2023 and October 2024 school censuses.
29. Falling rolls are measured at the MSOA within each local authority. This enables the DfE to capture falling rolls in small geographical areas within local authorities.
30. The falling rolls allocation for each local authority will be £141,890 per MSOA which sees a 10% or greater reduction in the number of pupils on roll between the two census years.
31. Local authorities will continue to have discretion over whether to operate a falling rolls fund. Where local authorities operate a fund, they will only be able to provide funding where school capacity data 2022 (SCAP) shows that school places will be required in the subsequent three to five years.
32. This SCAP requirement replaces previous guidance that funding may only be used where local planning data shows that the surplus places will be needed within the next 3 financial years.

33. The requirement that schools must be Ofsted rated 'good' or 'outstanding' to be eligible for falling rolls funding no longer applies.
34. Schools Forum should agree both the value of the fund and the criteria for allocation. As with the growth fund, funding for a falling rolls fund would have to come from within the existing NFF schools block.
35. Any fund established for the purposes of a Falling Rolls fund would represent a top slice of the Schools Block. Criteria would need to be established to support the fund, including clear trigger points for qualification. Compliant criteria could include.
- SCAP shows that school places will be required in 2025-26 and / or either of the subsequent two years (this is a mandatory requirement)
  - surplus capacity exceeds a minimum number of pupils, or a percentage of the published admission number
  - formula funding available to the school will not support provision of an appropriate curriculum for the existing cohort
  - the school will need to make redundancies to contain spending within its formula budget and it is expected
36. Any formula for funding schools could include.
- A rate per vacant place and maximum number of places
  - A lump sum payment to schools
37. Wiltshire Schools Forum has always resisted the establishing of a Falling Rolls Fund and is being asked to consider establishing such a fund, considering its previous decisions on this topic and the additional pressures being placed upon the Schools Block.
38. There has been no pressure from schools or other groups for the establishing of a Falling Rolls Fund, due to the previous limitations around the criteria, impact upon affordability from the Schools Block and the size of any potential funding awarded to schools, which would need to be meaningful.

**Proposal**

39. It is proposed that:

- a) Schools Forum approve the criteria for allocating pupil Growth Fund in 2025-26.
  - b) Schools Forum agree that the budget for the Growth Fund to be set at its meeting in January 2025, when the full DSG has been confirmed for the 2025-26 year.
  - c) Schools Forum give consideration to the establishing of a Falling Rolls Fund and any criteria befitting such a fund.
- 

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**Wiltshire Council**

**School Funding Working Group      28 November 2024**

**Schools Forum                              12 December 2024**

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## **National Funding Formulae for Schools – 2025-26**

### **Purpose of report**

1. To seek ‘in principle’ decisions from members of Schools Forum with regards to the Wiltshire funding formula for the 2025-26 year.
2. To update members of Schools Forum on the National Funding Formula (NFF) for 2025-26. Following the General Election and the appointment of a new Government, the key funding arrangements for the 2025-26 year are still awaited and are anticipated to be published by the end of November 2024.
3. The Department for Education published the
  - a. ‘*Summary policy note for schools and high needs national funding formula 2025 to 2026*’ on 6 November 2024
  - b. ‘*The national funding formulae for schools and high needs 2025-26*’ on 28 November 2024
  - c. ‘*Schools Operational Guide 2025 to 2026*’ on 28 November 2024.
4. Prior to the funding settlement being announced in mid-December, a number of ‘in principle’ decisions are sought to help with the school budget preparations. Separate papers have been prepared relating to the De-delegation consultation, funding to support the School Improvement services and the transfer of funding from the Schools Block to support the High Needs Block.

### **Background**

5. The 2025-26 year represents another year where the Government has pledged to boost schools funding, with an increase of £2.3bn into the overall Core Schools funding compared to the 2024-25 year. This will be split with a boost of £1.3bn to the Schools Block and £1bn to the High Needs Block.
6. The DfE will allocate school funding based on the National Funding Formula (NFF) to local authorities. The funding is then run through the local funding formula, taking account of Schools Forum decisions to create individual school budgets.
7. The 2025-26 year will be another ‘soft’ year with local Schools’ Forum still retaining its role in determining the school funding allocation methodology. The DfE have confirmed their intention to move to a ‘hard’ national funding formula and are proposing a move to the full hard formula by 2027-28. In the meantime, there will continue to be a tightening towards the full NFF.
8. The 2025 to 2026 schools NFF will use the same funding factors as the 2024 to 2025 NFF, with some ‘tightening’ of the formula for those authorities not following the NFF.

## Draft Proposals for 2025-26

9. The DfE published draft funding proposals on 6 and 28 November 2024 to confirm key elements of the NFF ahead of issuing finalised guidance by the end of November and then detailed funding allocations in December 2024.

## Schools Block Proposals for 2025-26

10. The main formula for the 2025-26 year is broadly similar to the formula for the 2024-25 year however there are some changes, as detailed below.
  - a. Overall, funding through the NFF will increase by £1.3bn
  - b. Funding the full 12 months of the teachers pay award
  - c. Teachers Pay Additional Grant (TPAG) for the September 2023 pay award being rolled into core funding
  - d. Teachers Pension Employers Contribution Grant (TPECG) being rolled into core funding
  - e. Core Schools Budget Grant (CSBG) will be uplifted from being a 7 month grant to a 12 month grant with the whole grant being rolled into core funding
  - f. Further funding in respect of the increase in employers' National Insurance contributions, will be provided in 2025 to 2026, by a grant outside the NFF
  - g. A transfer of up to 0.5% of Schools Block funding to the High Needs Block will be permitted, subject to Schools Forum approval
  - h. All NFF factors must be used in the formula
  - i. The Minimum Funding Guarantee (MFG) must be set between -0.5% and 0%
  - j. The provisional 2025-26 NFF funding values, incorporating the rolling in of TPAG, TPECG, CSBG and NFF Uplift are detailed in **Appendix 1**
  - k. The movement in NFF funding since 2019-20 to the provisional 2025-26 values are set out in **Appendix 2**

## **The Minimum Funding Guarantee**

11. The 'Minimum Funding Guarantee' (MFG) is a protection mechanism within the funding formula which means that schools are guaranteed a certain amount of per-pupil funding each year. Since the introduction of the NFF, schools have been guaranteed at least the same amount of per-pupil funding, plus 0.5%, year on year. In other words, the NFF has confirmed a minimum uplift of 0.5% in per pupil funding.
12. Unlike previous years where the NFF rate has been mandated between 0% and +0.5%, for the 2025-26 year Schools Forum can set the rate between -0.5% and 0%.
13. The MFG is calculated by taking the total School Budget Share and removing any 'school or premises' funding, including Lump Sum, Rates and Sparsity and then dividing the remaining funding by the number of pupils on roll. This then provides the MFG rate per pupil.
14. Funding through the MFG used to exceed £2.2m in the Wiltshire funding formula, however since moving to the NFF in 2018-19, the total quantum has not exceeded £250,000 and in the 2024-25 formula was £212,664.
15. Setting the MFG at 0.0% would ensure that all schools received a guarantee that their per pupil funding would at least be consistent with previous years, if not higher.

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

16. The government has stated its intention to move to a single direct NFF by 2027-28 and to determine every school's budget centrally. For the 2025-26 year, the DfE have confirmed it will be another 'soft' year, with each LA along with its Schools Forum being able to determine its school funding formula, subject to any NFF requirements and constraints.
17. All NFF factors have been mandatory since 2023-24 and the formula for Wiltshire will be presented to Schools Forum when the final allocations have been confirmed in mid-December and then to the LA for political ratification and approval in February 2024.

## Key Funding Decisions to be taken by Schools Forum for the 2025-26 year

18. A number of funding decisions need to be taken by Schools Forum for the 2025-26 year including.
- To apply all the NFF factors in full
  - To set the Minimum Funding Guarantee between -0.5% and 0%
  - To transfer funding from the Schools Block to High Needs Block

## Budget Setting Process 2025-26

19. The timeline for setting the 2025-26 budget is expected to follow.

12 December 2024	Schools Forum agree in principle decisions for funding, de-delegation and block transfers
20 December	DfE issue funding allocations
23 January 2025	Schools Forum confirm and 'sign off' school budgets for the 2025-26 financial year
25 February	School budgets signed off at Full Council meeting
By 28 February	All schools notified of funding for 2025-26

20. In terms of setting the budgets for schools for 2025-26, the amount of funding available for distribution to schools will be calculated as follows.

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

## Initial Modelling

21. Initial modelling of the Schools Block demonstrates that the NFF is affordable, based upon the October 2023 census and therefore the full NFF could be implemented.

## Proposal

22. Schools Forum to make 'in principle' decisions for the following formula factors to enable school budgets to be prepared ready for the January 2025 meeting.
- To apply all the NFF factors in full
  - To set the Minimum Funding Guarantee between -0.5% and 0%, in line with NFF and subject to affordability.

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## Appendix 1

Factor	2024-25 NFF Values	TPAG	TPECG	CSBG (7 months)	CSBG Uplift (5 months)	Provisional NFF Uplift	Provisional 2025-26 NFF Values
Primary KS1&2 AWPU	£3,562	£62	£75	£76	£51	£21	£3,847
Secondary KS3 AWPU	£5,022	£86	£106	£108	£71	£29	£5,422
Secondary KS4 AWPU	£5,661	£98	£119	£122	£80	£33	£6,113
Primary & Secondary FSM	£490					£5	£495
Primary FSM6	£820	£53	£65	£70	£45	£7	£1,060
Secondary FSM6	£1,200	£77	£100	£100	£68	£10	£1,555
IDACI Primary Band A	£680					£5	£685
IDACI Primary Band B	£515					£5	£520
IDACI Primary Band C	£485					£5	£490
IDACI Primary Band D	£445					£0	£445
IDACI Primary Band E	£285					£0	£285
IDACI Primary Band F	£235					£0	£235
IDACI Secondary Band A	£945					£5	£950
IDACI Secondary Band B	£740					£5	£745
IDACI Secondary Band C	£690					£5	£695
IDACI Secondary Band D	£630					£5	£635
IDACI Secondary Band E	£450					£0	£450
IDACI Secondary Band F	£340					£0	£340
Prior Attainment – Primary	£1,170					£5	£1,175
Prior Attainment – Secondary	£1,775					£10	£1,785
EAL – Primary	£590					£5	£595
EAL - Secondary	£1,585					£10	£1,595
Mobility – Primary	£960					£5	£965
Mobility – Secondary	£1,380					£5	£1,385
Lump Sum	£134,400	£2,306	£2,800	£2,900	£1,915	£779	£145,100
Sparsity – Primary (Max.)	£57,100					£300	£57,400
Sparsity – Secondary (Max.)	£83,000					£400	£83,400
Split Sites	£80,600					£400	£81,000
Primary - MPPFL	£4,610					£345	£4,955
Secondary – MPPFL	£5,995					£470	£6,465

## Appendix 2

Factor	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26 Provisional
Primary KS1&2 AWPU	£2,747	£2,857	£3,123*	£3,217	£3,394**	£3,562***	<b>£3,847****</b>
Secondary KS3 AWPU	£3,863	£4,018	£4,404*	£4,536	£4,785**	£5,022***	<b>£5,422****</b>
Secondary KS4 AWPU	£4,386	£4,561	£4,963*	£5,112	£5,393**	£5,661***	<b>£6,113****</b>
Primary & Secondary FSM	£440	£450	£460	£470	£480	£490	<b>£495</b>
Primary FSM6	£540	£560	£575	£590	£705**	£820***	<b>£1,060****</b>
Secondary FSM6	£785	£815	£840	£865	£1,030**	£1,200***	<b>£1,555****</b>
IDACI Primary Band A	£575	£600	£620	£640	£670	£680	<b>£685</b>
IDACI Primary Band B	£420	£435	£475	£490	£510	£515	<b>£520</b>
IDACI Primary Band C	£390	£405	£445	£460	£480	£485	<b>£490</b>
IDACI Primary Band D	£360	£375	£410	£420	£440	£445	<b>£445</b>
IDACI Primary Band E	£240	£250	£260	£270	£280	£285	<b>£285</b>
IDACI Primary Band F	£200	£210	£215	£220	£230	£235	<b>£235</b>
IDACI Secondary Band A	£810	£840	£865	£890	£930	£945	<b>£950</b>
IDACI Secondary Band B	£600	£625	£680	£700	£730	£740	<b>£745</b>
IDACI Secondary Band C	£560	£580	£630	£650	£680	£690	<b>£695</b>
IDACI Secondary Band D	£515	£535	£580	£595	£620	£630	<b>£635</b>
IDACI Secondary Band E	£390	£405	£415	£425	£445	£450	<b>£450</b>
IDACI Secondary Band F	£290	£300	£310	£320	£335	£340	<b>£340</b>
Prior Attainment – Primary	£1,022	£1,065	£1,095	£1,130	£1,155	£1,170	<b>£1,175</b>
Prior Attainment – Secondary	£1,550	£1,610	£1,660	£1,710	£1,750	£1,775	<b>£1,785</b>
EAL – Primary	£515	£535	£550	£565	£580	£590	<b>£595</b>
EAL - Secondary	£1,385	£1,440	£1,485	£1,530	£1,565	£1,585	<b>£1,595</b>
Mobility – Primary	£0	£875	£900	£925	£945	£960	<b>£965</b>
Mobility – Secondary	£0	£1,250	£1,290	£1,330	£1,360	£1,380	<b>£1,385</b>
Lump Sum	£110,000	£114,400	£117,800	£121,300	£128,000**	£134,400***	<b>£145,100****</b>
Sparsity – Primary (Max.)	£25,000	£26,000	£45,000	£55,000	£56,300	£57,100	<b>£57,400</b>
Sparsity – Secondary (Max.)	£65,000	£67,500	£70,000	£80,000	£81,900	£83,000	<b>£83,400</b>
Split Sites						£80,600	<b>£81,000</b>
Primary - MPPFL	£3,500	£3,750	£4,180	£4,265	£4,405	£4,610	<b>£4,955</b>
Secondary – MPPFL	£4,800	£5,000	£5,415	£5,525	£5,715	£5,995	<b>£6,465</b>

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

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

\*\*\* - Incorporates the Mainstream Schools Additional Grant for 2024-25 for AWPU, FSM6 and Lump Sum

\*\*\*\* - Incorporates the Teachers Pay Grant, the Teachers Pension Grant and the Core Schools Budget Grant

**Wiltshire Council**

**Schools Forum**

**12 December 2024**

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## **Schools Block Transfer 2025/26 – Consultation Outcome Report**

### **Purpose of the Report**

1. To update Schools Forum on the outcomes of the consultation on the proposal to transfer 1% from the schools block to high needs block in 2025/26.

### **Background**

2. 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 seek the agreement of the Secretary of State.
3. In Wiltshire, Schools Forum has recognised the pressures against the high needs block and a transfer of funding from the schools block has historically been agreed, following consultation with schools, 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. This was in line with the proposals in the council's High Needs Sustainability Plan.
4. The Safety Valve agreement that the council has in place with the DfE includes an assumption of a transfer of 1% of schools block into high needs block each year from 2025/26 to 2028/29. For this reason, the council has consulted with schools on a proposal for a 1% transfer from schools block into high needs block in the 2025/26 financial year. The consultation opened on 17 October 2024 and closed on 21 November 2024.

### **Consultation Outcomes**

5. A detailed report on the outcomes of the consultation is attached to this report.
6. 61 responses were received, one of those responses was from a special school and this has not been included in the analysis as special schools are not funded from the schools block.
7. The majority of respondents were in support of a transfer of funding from schools block to high needs block. 66.7% of respondents supported the proposal for a transfer of funds from schools block to high needs block.
8. Of those respondents who supported a transfer of funding, the majority were not in support of the proposal to transfer 1% of schools block. 60.0% of respondents who supported a transfer of funding did not support a transfer of 1%. Comments

provided by those respondents indicated majority support for a transfer of 0.5% or a value that would not impact on NFF formula rates.

9. Responses have also been analysed by phase and by size of school following discussion at the Schools Funding and SEN Working Group. This analysis is also included in the consultation outcome report.
10. The majority of respondents took time to provide additional comments to support their responses. These were shared in detail with the Schools Funding and SEN Working Group and are summarised in the attached consultation outcome report. There were a significant number of comments, including from those that would not experience a reduction in funding.
11. The majority of comments from respondents who voted No to a transfer of funding referred to the financial impact on their schools. Comments also noted existing cost pressures and wider concerns relating to the SEND system.
12. There were a number of comments relating to the format and distribution method for the consultation. These are noted and will inform any future consultations.

### **Considerations for Schools Forum**

13. Schools Forum is asked to consider the outcome of the consultation and whether a transfer of 1% from schools block to high needs block is supported. In considering this it would be important to take the following into account:
  - a. The schools block report considered earlier on this agenda confirms a minimum uplift of 0.5% in per pupil funding within the NFF in 2025/26.
  - b. Consultation responses from schools indicate support for a block transfer.
  - c. Those who have responded to the consultation, and indicated support for a block transfer, do not support a transfer of 1%.
  - d. The cash value built into the original safety valve plan is £3.754m, this is estimated to be 0.96% of schools block based on the provisional allocation for 2025/26. This will be updated in January following the final funding settlement.
  - e. In 2024/25 Schools Forum agreed a transfer of £2.0m, or 0.55%, as the maximum affordable value without impacting on NFF rates. A similar proposal could be considered, and agreed in principle, however the maximum affordable level will not be confirmed until January Schools Forum meeting.

### **Proposal**

14. Schools Forum is asked to consider the proposed level of transfer from schools block to the high needs block in 2025/26. A number of options could be considered, including (but not exclusively):
  - a. No transfer
  - b. A transfer of 0.5%
  - c. A transfer of the maximum value affordable without impacting NFF values
  - d. A transfer of less than 1% that has a lower impact on NFF values
  - e. A transfer of 1%



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## **Consultation Outcome Report:**

**Transfer of funding from the Schools Block of the Dedicated Schools Grant to the High Needs Block in the Financial Year 2025/26**

Liz Williams  
Finance Lead – High Needs Block Sustainability  
November 2024

## 1. Executive Summary

This summary highlights the key outcomes of the consultation on the transfer of funding from schools block to high needs block in 2025/26. The consultation was held between 17 October and 21 November 2024 and sought the views of headteachers, governors and senior leaders from Wiltshire's mainstream schools and multi-academy trusts. 61 responses were received, one of those responses was from a special school and this has not been included in the analysis as special schools are not funded from the schools block.

**The majority of respondents were in support of a transfer of funding from schools block to high needs block.** 66.7% of respondents supported the proposal for a transfer of funds from schools block to high needs block.

**Of those respondents who supported a transfer of funding, the majority were not in support of the proposal to transfer 1% of schools block.** 60.0% of respondents who supported a transfer of funding did not support a transfer of 1%. Comments provided by those respondents indicated majority support for a transfer of 0.5% or a value that would not impact on NFF formula rates.

The majority of comments from respondents who voted No to a transfer of funding referred to the financial impact on their schools. Comments also noted existing cost pressures and wider concerns relating to the SEND system.

The majority of respondents took time to provide additional comments to support their responses. These are all included in this report.

There were a number of comments relating to the format and distribution method for the consultation. These are noted and will inform any future consultations.

## 2. Background

The schools block is the amount of Dedicated Schools Grant (DSG) that is allocated to fund the National Funding Formula (NFF) for pupils aged 5 to 16, in mainstream schools. The high needs block is the amount of DSG that is allocated to support pupils aged 0 to 25 with special educational needs and disabilities (SEND).

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 seek the agreement of the Secretary of State.

In Wiltshire, Schools Forum has recognised the pressures against the high needs block and a transfer of funding from the schools block has historically been agreed, following consultation with schools, 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. This was in line with the proposals in the council's High Needs Sustainability Plan.

The council's DSG 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 is supported by investment from the high needs block, the council and a transfer from the schools block. The high needs block deficit remains the most significant financial risk for the council.

The High Needs Sustainability Plan prioritises investment in early support for schools and families and an increase in specialist provision across special schools and resource bases.

The plan approved by the DfE, the council and by Schools Forum, 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. The transfer is part of the investment required to support the delivery of the plan and support required to reduce the high needs deficit. Whilst the block transfer is built into the agreed plan, it is recognised that it must be the subject of an annual consultation with schools and Schools Forum, and agreement by the Secretary of State. It is also recognised that this is in the context of an increasingly difficult financial environment for schools.

For this reason, the council made the decision to consult with schools on a transfer of 1% of schools block funding into the high needs block for the 2025/26 financial year. The consultation opened on 17 October 2024 and closed on 21 November 2024.

### **3. Consultation Objectives**

The consultation sought the views of schools on a proposal to transfer a total of 1% of schools block funding to the high needs block.

The aim of the consultation was to hear the views of schools on the proposed transfer and to inform the discussions at Schools Forum on 12 December 2024.

### **4. Consultation Process and Communications**

In June 2024 a report was taken to Schools Forum confirming the council's intention to consult on a 1% block transfer, in line with the High Needs Sustainability Plan, and seeking the views of Schools Forum members on what information needed to be included in the consultation to enable schools to make an informed response.

The consultation went live on Right Choice on 17 October 2024. The consultation document included a summary of the expected changes to services proposed in the High Needs Sustainability Plan, and an indicative financial impact for each school. The financial impact was modelled based on 2024/25 figures as no provisional allocations have been received for the 2025/26 financial year.

A briefing was given to the WASSH Conference on 11 October highlighting the key issues within the consultation document and the indicative impact on schools.

An online briefing was held for Primary Head Teachers on 5 November. 9 Head Teachers attended and a recording of the briefing was made available.

A briefing was sent to governors on 11 November.

A brief summary of the consultation was presented at the Head Teacher briefing on 12 November.

All questions submitted by e-mail on the detail of the consultation were responded to.

Feedback has been received from some respondents that the method of distributing the consultation via Right Choice made it difficult to access and respond to. Whilst Right Choice has been used previously for the annual finance consultations, this feedback will inform the method of any further consultations.

### **5. Summary of Consultation Responses**

In total 61 responses were received, broken down as follows:

- 15 Mainstream Secondary Schools
- 42 Mainstream Primary Schools
- 3 Multi Academy Trusts
- 1 Special School

This compares to 16 responses to the block transfer consultation last year.

The Multi Academy Trusts provided a trust wide response and between them covered 28 schools. There was a small level of duplication where 6 of those schools also submitted an individual response, however, adjusting for that, 79 schools in total were represented in the responses to the consultation.

The response from the special school has not been included in the analysis of responses as special schools are not funded from the schools block. It should be noted that responses from special schools have been included in previous years.

The consultation questions are attached at Annex 1 to this report.

Responses to the consultation are summarised as follows:

**Question 1(a) Do you support a transfer of any funding from the schools block to the high needs block?**

	Total	%
<b>Yes</b>	40	66.1%
<b>No</b>	20	33.9%

This is split between different phases as follows:

	Yes	No	Total
Primary	28	14	42
Secondary	11	4	15
MAT	1	2	3
	<b>40</b>	<b>20</b>	<b>60</b>

	Yes	No	Total
Primary	67%	33%	100%
Secondary	73%	27%	100%
MAT	33%	67%	100%

The responses can be analysed by size of school using the DfE criteria for small schools (as defined by the sparsity factor in the NFF). Primary schools with fewer than 75 pupils are considered to be “very small” and primary schools with fewer than 150 pupils are defined as “small”. For secondary schools the pupil numbers for “very small” and “small” are 350 and 600 respectively.

	<b>Yes</b>	<b>No</b>	<b>Total</b>
V Small	3	0	3
Small	8	4	12
Other	29	16	45
	<b>40</b>	<b>20</b>	<b>60</b>

	<b>Yes</b>	<b>No</b>	<b>Total</b>
V Small	100%	0%	100%
Small	67%	33%	100%
Other	64%	36%	100%

**Question 1(b) If you support a transfer, do you support the proposed transfer of 1%?**

	<b>Total</b>	<b>%</b>
<b>Yes</b>	16	40.0%
<b>No</b>	24	60.0%

This is split across different phases as follows:

	<b>Yes</b>	<b>No</b>	<b>Total</b>
Primary	12	16	28
Secondary	4	7	11
MAT	0	1	1
	<b>16</b>	<b>24</b>	<b>40</b>

	<b>Yes</b>	<b>No</b>	<b>Total</b>
Primary	43%	57%	100%
Secondary	36%	64%	100%
MAT	0%	100%	100%

The split across very small and small schools compared with other schools is as follows:

	<b>Yes</b>	<b>No</b>	<b>Total</b>
V Small	2	1	3
Small	5	3	8
Other	9	20	29
	<b>16</b>	<b>24</b>	<b>40</b>

	<b>Yes</b>	<b>No</b>	<b>Total</b>
V Small	67%	33%	100%
Small	63%	38%	100%
Other	31%	69%	100%

**Question 1(c) If you are in support of a transfer from the Schools Block to the High Needs Block, but not in agreement with a transfer of 1%, what level of transfer could you support?**

There were **26** comments in response to this question.

The majority of responses stated a preference for a transfer of 0.5%.

The second most popular suggestion was for a transfer of 0.55% or a transfer that did not affect NFF rates for schools.

Two schools stated a preference for less than 0.5% and two suggested up to 0.75%

**Question 1(d) Please give your reasons for saying no to a transfer from the schools block to the high needs block.**

There were **16** comments in response to this question which can be grouped under the following headings:

***Direct Financial Impact on Schools***

- Many schools highlighted existing budget pressures and low levels of funding
- Cost of living pressures on school budgets
- A small number of schools highlighted that they were in a deficit position which would be further impacted by a reduction in funding.
- A number of schools highlighted the potential direct impact of the proposed transfer on their ability to employ staff, in particular support staff who would be directly supporting pupils with SEND
- Potential inequity in impact on schools due to the protections in the formula for schools on MFG or MPPFL meaning that some schools would not have their funding adjusted

***Wider SEND System***

- Some respondents commented that they understood the rationale to reduce the deficit but questioned the sustainability of using a transfer from schools block to reduce the high needs deficit.
- Comments highlighted wider concerns with the SEND system as a whole and questioned the difference that the schools block transfer could make versus the impact of the loss of funding at school level.
- Concerns that reducing funding for mainstream schools would reduce capacity for early intervention at school level.

***High Needs Sustainability Plan***

- Concern that the plan has already been reported as off track. One respondent stated a lack of confidence that the plan could be brought back on track.
- Concern that the plan does not fully recognise the challenges facing schools and that the transfer would erode trust between schools and the council.
- At least one response highlighted that in their view support for schools is limited.



### ***Government Funding/Reform***

- A number of comments highlighted the possibility of further government reform or funding in this area.

### **Question 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?**

There were **23** comments made in response to this question. These can be grouped under the following themes:

#### ***Funding***

- Explore external funding streams
- Some respondents expressed the view that we should await the full detail of the autumn budget announcements before reducing funding for schools.

#### ***The High Needs Sustainability Plan***

- Review existing proposals.
- Lack of clarity about the proposals in the plan.
- A number of respondents identified specific areas for review or change within the plan including:
  - Review the investment and savings in Workstream 2 where costs in 2025/26 exceed savings
  - More SEND team members going into schools or a bank of TAs
  - Realistic funding to support children
  - Staff to work alongside schools to support mental health or SEMH
  - Increase the focus on early intervention
  - Maximise the use of local provision rather than external placements
  - Review commissioned services

#### ***SEND Processes***

- Rationalise and streamline EHCP process
- SEND professionals to work directly with children
- Streamline processes for accessing support

#### ***Financial Processes***

- One respondent suggested that school balances should be taken into account in calculating the transfer adjustment.

### **Question 3 - Do you have any further comments that you would like to make in response to this consultation?**

There were **46** comments made in response to this question and they can be grouped under the following themes:

In general respondents stated that they understood the need to address the high needs deficit.

### ***Consultation Process***

- A few respondents commented on the consultation process including:
  - The consultation felt “hidden” and was difficult to search for on Right Choice
  - Difficult to respond because of the format of the document
  - Delay in sending the document direct to Governors
- A number of respondents commented that they were unclear as to why the indicative figures showed that some schools would not be required to make a contribution.
- One respondent expressed concern that money could be taken from schools without the consent of Schools Forum and that this raised issues of trust.

### ***Financial Impact on Schools***

The majority of responses to this question were in this category and are summarised as follows:

- Financial pressures affecting all schools and concerns that a relatively small percentage reduction in school budgets could compound existing challenges faced by schools in managing their budgets.
- Comments expressed the view that the proposal did not sufficiently recognise the financial pressures being faced by schools.
- Inequity in the distribution of reduction in funding due to the protections in the NFF
- Wider cost pressures faced by schools including recruitment and staff costs, falling rolls and high maintenance costs. Academies not able to set deficit budgets.
- For many schools this would potentially result in staff reductions.

### ***High Needs Sustainability Plan/Local SEND System***

- A number of comments recognised the need to invest to better support pupils with SEND however did not support that investment being funded by reductions from school budgets.
- Concerns that the plan is off track
- Concerns that funding in schools is insufficient to meet the needs of pupils with EHCPs
- Mismatch between needs and provision across the county
- While the High Needs Sustainability Plan aims to reduce deficits through early intervention and increased local provision, schools are not yet seeing these benefits.

### ***National SEND System***

- A number of comments related to the potential impact of government reforms to SEND and wider school structures and uncertainty about how this would impact on schools.
- This is a national issue that really needs a national response with adequate funding being provided from central government

**Annex 1 – Consultation Response Form**

**Transfer of funding from the Schools Block of the Dedicated Schools Grant to the High Needs Block in the Financial Year 2025/26**

<b>School</b>	
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**Q1 a) Do you support a transfer of any funding from the School Block to the High Needs Block?**

<b>Yes</b>	
<b>No</b>	

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, do you support the proposed transfer of 1%:**

<b>Yes</b>	
<b>No</b>	

**c) If you are in support of a transfer from the Schools Block to the High Needs Block, but not in agreement with a transfer of 1%, what level of transfer could you support?**

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

**This decision has been made 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?**

<b>Confirm NOT to transfer funds</b>	
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**Please give your reasons for saying no to a transfer from schools block to high needs block**

**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?**

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**3) Do you have any further comments that you would like to make in response to this consultation?**

Return Signed off by:

Name:	
Position:	
Date:	

## **Annex 2 – List of Respondents**

Sarum Academy  
St Joseph's Catholic School  
Matravers School  
The Trafalgar School at Downton  
Bishop Wordsworth's Church of England Grammar School  
Abbeyfield School  
Lavington School  
Devizes School  
The Stonehenge School  
Melksham Oak Community School  
Hardenhuish School  
St John's Marlborough  
Wyvern St Edmund's  
Sheldon School  
Royal Wootton Bassett Academy  
Luckington Community School  
Broad Hinton Church of England Primary School  
Heddington Church of England Primary School  
Oaksey CofE Primary School  
Whiteparish All Saints Church of England Primary School  
Morgan's Vale and Woodfalls Church of England Primary School  
Chilton Foliat Church of England Primary School  
Wootton Bassett Infants' School  
Baydon St Nicholas Church of England Primary School  
Semley Church of England Voluntary Aided Primary School  
Hullavington CofE Primary and Nursery School  
Kington St Michael Church of England Primary School  
Crudwell CofE Primary School  
Marden Vale CofE Academy  
St Nicholas Church of England Primary School, Porton  
The Holy Trinity Church of England Primary Academy  
Durrington Church of England Controlled Junior School  
Preshute Church of England Primary School  
Woodlands Primary School  
Princecroft Primary School  
St Michael's CofE Aided Primary  
Cherhill CofE School  
Holy Trinity Church of England Academy  
Amesbury Church of England Voluntary Controlled Primary School  
Bemerton St John Church of England Primary  
Charter Primary School  
Mere School  
Holbrook Primary School  
Wellington Eagles Primary Academy  
Colerne CofE Primary School

Noremarsh Junior School  
Walwayne Court School  
Longleaze Primary School  
Ludgershall Castle Primary School  
Priestley Primary School  
Redland Primary School  
Kings Lodge Primary School  
Kiwi Primary School  
St Mary's Church of England Primary School & Nursery, Purton  
Lyneham Primary School  
Marlborough St Mary's CE Primary School  
Fynamore Primary School  
Magna Learning Partnership  
DSAT  
Pickwick Academy Trust