

**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.	<p><b>Welcome and Apologies</b></p> <p>MT welcomed the group to the virtual meeting.</p>	
2.	<p><b>Minutes</b></p> <p>There were no outstanding actions.</p>	
3.	<p><b>Matters Arising</b></p> <p>MT updated the group on some relevant points from a DfE regional meeting earlier this week.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>There was also discussion round section 19 medical needs peoples and recharging schools and excluded people recharging.</p> <p>A question was asked about the early years NI insurance grant and no detail was available. The DfE were publishing something “hopefully soon.”</p>	
4.	<p><b>Schools Funding (DSG) Budget Monitoring Report (MT)</b></p> <p>MT shared her report &amp; 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>	

	<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