

Worcestershire Schools Forum (WSF) Agenda 18th November 2021

10 am

Remote Meeting

Via MS Teams

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Thursday 20th January 2022 at 2pm Remote Meeting to Be Held Via MS Teams

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worcestershire county council

MINUTES OF THE MEETING OF THE WORCESTERSHIRE SCHOOLS FORUM (WSF)

Thursday 23rd September 2021
Remote Meeting Held Via MS Teams

The meeting started at 2.05 pm

IN ATTENDANCE:

WSF Members

Malcolm Richards (Chair)	-	Governor, Bromsgrove
Bryn Thomas (Vice Chair)	-	HT Wolverley CE Secondary School
Marie Pearse	-	HT Evesham Nursery School
Paul Essenhigh	-	Executive HT Catshill Middle, Catshill First and Nursery Schools
Nathan Jones	-	HT Meadow Green Primary School
Emma Pritchard	-	Principal Black Pear Trust
Lizzie Dixon	-	HT Franche Primary School
Ed Francis	-	HT Fort Royal Primary School
Jay Hart	-	HT Kingfisher School
David McIntosh	-	Governor, Wyre Forest
Tim Read	-	Church of England Board of Education
Catriona Savage	-	PVI Sector
Tom Jenkins	-	PVI Sector

Local Authority (LA)

Phil Rook	-	Director of Resources Worcestershire Children First
Sarah Wilkins	-	Director of Education and Early Help Worcestershire Children First
Councillor Marcus Hart	-	Cabinet Member with Responsibility for Education
Chris Bird	-	Senior Finance Business Partner Worcestershire Children First
Caroline Brand	-	Schools Finance Manager Worcestershire Children First
Rob Phillips	-	Schools Finance Team Worcestershire Children First

1. ELECTION OF CHAIR AND VICE CHAIR OF THE WSF

1.1 WSF Chair

(a) Phil took the Chair and advised the term of office for Chair of the WSF had expired. So, there was a need for the WSF to elect a Chair of the WSF and so nominations were requested.

(b) Malcolm Richards was nominated as Chair and agreed by the forum. There were no other nominations.

RESOLVED –

That Malcolm Richards be duly elected as Chair of the WSF from 23rd September 2021 for a period of 2 years.

1.2 WSF Vice Chair

(a) Phil further advised the term of office for Vice Chair of the WSF had also expired. So, there was a need for the WSF to elect a Vice Chair of the WSF and so nominations were requested.

(b) Bryn Thomas was nominated as Vice Chair and agreed by the forum. There were no other nominations.

RESOLVED –

That Bryn Thomas be duly elected as Vice Chair of the WSF from 23rd September 2021 for a period of 2 years.

2. Apologies

Adrian Ward	-	HT Trinity High School
Phil Hanson	-	HT Pershore High School
Jeff Robinson	-	Governor, Malvern Hills
John Bateman	-	Governor, Aspire Alternative Provision
Emma Pritchard	-	Principal Black Pear Trust
Ian Enwright	-	Executive HT Riversides and Newbridge Schools
Gabrielle Stacy	-	Worcestershire Children First

3. DECLARATION OF INTERESTS

None.

4. DECLARATION OF POTENTIAL CONFLICT OF INTERESTS WITH ITEMS ON THE AGENDA

Chris Bird declared an interest as a foundation trustee of the Lady of Lourdes MAT.

5. MINUTES OF THE LAST MEETING (23rd September 2021)

Agreed.

5. MATTERS ARISING

None as all picked up within the agenda.

6. ANY OTHER BUSINESS

6.1 The WSF requested an update on issues regarding onboarding of staff with Liberata and concerns in meeting the payroll deadline. Caroline advised that there had been some issues and emergency payments will be made if necessary. Phil advised that any concerns be raised to him and he would raise with Richard Taylor, Head of HR and Engagement as part of contract monitoring with Liberata.

6.2 The Chair referenced a presentation circulated by NGA governor representatives that was held on Monday about the NFF consultation and the future role of forum that he and Phil attended and presented at. The Chair added that there would be a article in Governing Matters in November and this may gain momentum.

6.3 Sarah asked if forum members were still incurring additional costs due to Covid – numerous members commented and addition cleaning costs, resources both financial and staff supporting testing and PPE, Sarah said she would feed back to the DfE.

7. WSF ATTENDANCE ACADEMIC YEAR 2020-21

7.1 The WSF noted the attendance list from the last academic year 2020-21.

7.2 The WSF noted the number of vacancies continues to be high in specific categories and were encouraged to canvass their respective groups for nominations.

8. SCHOOL AND LA FUNDING UPDATE 2022-23

8.1 DfE Funding Announcements July 2021 and DfE Consultation 2022-23

(a) Phil advised the DfE had announced their policy direction for 2022-23 and the consultation closes on 30 September 2021. The key issues were as follows: -

- The ESFA have published provisional funding allocations for 2022-23 for the schools, high needs and central school services national funding formulae (NFF).
- The DfE will publish provisional DSG allocations for LAs for 2022-23 in December 2021 based upon the October 2021 census and other 2021 data sets.
- For the **Schools NFF**: -
 - Proposal to include all NFF funding factors for pupil-led and school-led in the hard NFF with no local adjustment.
 - Premises factors (PFI, Split Site and Exceptional) to be reviewed to see if they can reflect actual costs – there will be a separate consultation on this.
 - MFG to remain but could introduce local flexibility.
 - EAL – LAs to use the EAL3 measure.
 - Sparsity – continuing flexibilities on thresholds to remain
 - Pupil Growth Funding and New School set up costs – data collection from LAs and introduce national standardized criteria for including in schools core NFF allocations – there will be further consultation on this.
 - Timescales – no new restrictions on LA formulae for 2022-23 but initiate initial movement of LA formulae closer to the NFF from 2023-24 by bringing each LA formula factor at least 10% closer to the NFF.

- For **Central Schools Services:** -
 - Continue to fund statutory responsibilities that LAs hold for all schools centrally as well as continuing the national system for funding copyright licenses.
 - Review of services subject to de-delegation – subject to a further technical consultation.
 - Consider whether this becomes part of the Local Government Finance Settlement (LGFS) instead of in the DSG.
 - Funding for Historic Commitments to be removed when the hard NFF is introduced.

For SEND

- Continue to fund statutory responsibilities that LAs hold for all schools centrally as well as continuing the national system for funding copyright licenses.
- Review of services subject to de-delegation – subject to a further technical consultation.
- Consider whether this becomes part of the Local Government Finance Settlement (LGFS) instead of in the DSG.
- Funding for Historic Commitments to be removed when the hard NFF is introduced.

Schools Forum Role

- Significant changes to existing roles and responsibilities and DfE to initiate a wider review of Schools Forums.

Consistent Funding Year

- DfE want to explore the pros and cons of setting funding allocations for both maintained schools and academies on a consistent academic year basis.
- Maintained schools would be expected to account for their funding on a financial year basis (7 months and 5 months from each academic year).

8.2 Phil advised the forum on the key changes in DfE indicative DSG allocations and the DfE NFF rates for 2022-23 and advises members that table shows the increases in the units of resource in comparison to 2021-22.

Overall Schools Block DSG

- School funding is increasing by 3.2% overall and by 2.8% per pupil compared with 2021-22.
- The funding floor allocating at least 2% more in pupil-led funding per pupil, and a 2% increase in minimum per pupil funding levels directing further increases to the lowest funded schools.
- Increased total funding through the sparsity factor from £42m to £95m in 2022-23.
- LAs will again be able to transfer up to 0.5% of their total schools' block allocations to other blocks of the Dedicated Schools Grant (DSG), with school's forum approval. A disapplication will continue to be required for transfers above 0.5%, or for any amount without school's forum approval.

High Needs DSG

- High needs funding is increasing by £780m in 2022-23.
- Technical change to the historic spend factor within the high needs national funding formula, following the consultation earlier this year. The factor has been updated to use 50% of LAs actual spend data in 2017-18 rather than their planned spend.

Central Schools Services DSG

- Funding in 2022-23 will increase to £284m for the on-going responsibilities that LAs continue to have for all schools.
- Funding for historic commitments within this block will decrease by a further 20% for those LAs in receipt of this funding.

Mainstream Schools Funding Formula

- The funding factors used in the 2022-23 schools' national formulae remain the same, but with some technical changes.
- Sparsity – to improve the accuracy to identify schools' remoteness the NFF will use road distances instead of straight-line distances in the calculations and introduce a new distance 'taper'. These changes will significantly increase the number of schools attracting sparsity funding.
- FSM 6 – decrease the funding lag for the 'FSM6' deprivation funding factor by 9 months, by moving from using the previous year's January census to the October census for measuring eligibility.
- Low Prior Attainment (LPA) – in calculating LPA proportions, data from the 2019 early years foundation stage profile (EYFSP) and key stage 2 (KS2) tests is used as a proxy for the 2020 tests, following the cancellation of assessment due to the pandemic.
- Schools' Business Rates – will be paid by ESFA to billing authorities directly on behalf of all state funded schools from 2022-23. Further details on this will be issued separately within the formal consultation response over the summer.
- LAs will continue to determine final allocations for all local mainstream schools in 2022-23.

Phil advised the forum on the DfE indicative DSG allocations and the DfE NFF rates for 2022-23.

(b) The WSF noted and changes and the indicative DSG allocations and NFF funding rates for the mainstream schools funding formula in Appendices A and B. The WSF commented as follows: -

- The forum welcomed the increase in funding, however the highlighted the current and continuing pressures on schools' budgets.
- The forum commented that the increase in High Needs was welcome, but would not solve the historic underfunding which is the main cause of the deficit
- Phil commented that the consultation was silent on the future treatment of deficits and this issue now represents a potential threat for the financial sustainability of the council once the 'cliff edge' of 2022-23 is reached – the point at which the statutory override ends, and the deficits return to councils' balance sheets with the requirement to offset the deficits with other reserves.
- Cllr Hart agreed and highlighted the change in the DfE and would raise our issues with our local MP Robin Walker who is now the Schools Minister, who was always well versed and briefed in the impact of schools funding in Worcestershire, prior to his appointment.
- Following a discussion on various questions contained in the consultation document, the WSF agree with the response to the consultation and approve this be submitted.

8.3 Local Consultation Process for 2022-223

(a) The WSF were requested to consider the consultation process issues for 2022-23.

(b) Phil introduced the report which detailed the areas for consideration – the LSFF, transfers from the Schools Block to High Needs, de-delegation for maintained schools and the provision of central services for all schools.

(c) Given the continuation of existing DfE national policy into 2022-23, the LA recommended to the WSF the following: -

- For the last 4 years schools have supported the decisions detailed above, so the usual full consultation document need not be issued.
- The WSF endorse and approve the continuation of the 2021-22 arrangements into 2022-23.
- A communication is sent to schools to that effect, giving details of the continuing DfE policy for 2021-22 continuing into 2022-23 and that no change is proposed to the current local policy.
- A brief report is considered by WCC Cabinet at their meeting on 9th December 2021 to approve continuing with the current arrangements into 2021-22.
- The WSF at its meetings in November 2021 and January 2022 formally approve the arrangements as required for de-delegation and centrally retained services together with the endorsement of the completion of the APT for 2022-23 to the ESFA by 21st January 2022 as required.

(d) The WSF commented that stability for schools is key and agreed to endorse and approved the LAs proposed approach detailed above.

RESOLVED –

The WSF endorsed and approved for 2022-23: -

- **Not to issue the usual consultation document;**
- **The LSFF to continue as far is affordable and practicable to be based upon the DfE Year 4 NFF parameters;**
- **No transfer of 0.5% of the Schools Block funding to support High Needs budget pressures;**
- **Continuing the current arrangements for delegation or de-delegation for maintained mainstream schools and for the central retention of designated centrally retained services;**
- **For a communication to be circulated to this effect to all schools, including details on the DfE policy arrangements for 2022-23.**

9. High Needs Update

(a) Phil introduced the item and Chris ran through the update in terms of the increase of the deficit in 2021-22 and detailed the reasons behind the increase and the challenges faced in the service. Phil also reminded the forum of the national context predicting a deficit of £1.3bn by the end of 2022-23 for member LAs and given the change to the accounting treatment is only for a 2-year period this represents a significant financial 'cliff edge' when the deficit reverts back to local authorities.

(b) Sarah ran through the High Needs management plans and ran through the actions that have occurred since the last forum. Phil also advised that the commissioning for independent placements will move from SEND to Resources to ensure a consistent approach and more commercial approach to place children in independent schools.

(c) The WSF asked questions and commented as follows: -

- Concerns were raised by the Vice Chair that the report contained some inaccuracies and inconsistencies and that the report was identical to the previous one, apart from the updated finance section.
- The Vice Chair raised disappointment given the profile of this area and Forum's role to monitor and challenge due to lack of detailed information.
- It was also noted that this latest report did not include narrative and rationale for the increase in the forecast deficit of £1.3M (10.5%) or individual workstream areas to enable the Forum to monitor progress or lack of progress since the last meeting.
- The role of the WSF is to receive reports and scrutinise the HN Management Plan actions, such as the significant numbers and associated costs of independent sector placements, and the Forum requires this detailed information in advance to consider and review, although it was acknowledged that the verbal update was very helpful from officers.
- The HN Management Plan will continue to be discussed at the WSF and monitoring of the HN budget will be part of that agenda with the detailed information for the forum outline above.

The meeting closed at 3.10pm

The date of the next WSF meeting: - Thursday 18th November 2021 at 2pm
via MS Teams

Liberata

INTERNAL ONLY

Worcestershire Schools Forum

Ian Fitzgerald – November 2021



An Apology



We strive for excellence in performance, accuracy and customer satisfaction.

It is clear on this occasion, we have let ourselves and you down – for this we are sorry.

Our focus had been on rectification of those payroll issues and as such we let you down in our communication, whether by answering the phones or replying to queries & escalations in a timely manner.

We understand the frustration and in some cases the personal hardship these actions, off the back of large influx of correspondence has caused to your colleagues & we appreciate your patience whilst we build back our reputation.

September Volumes



Volumes	Sep-17	Sep-18	Sep-19	Sep-20	Sep-21	% variance on 2020
Starters	391	382	335	262	373	42%
User logins	426	382	325	262	429	64%
Leavers	77	207	237	60	143	138%
Transfer (in)	338	372	372	375	290	-23%
Transfer (out)	41	93	912	196	163	-17%
Salary Changes	250	215	193	173	356	106%
Changes of Hours (inc TTO)	803	744	698	628	902	44%
Positions	389	183	80	91	261	187%
Elements	1417	1352	1286	2374	2922	23%
Total No of Transactions	4132	3930	4438	4421	5839	32%
Total No of Payslips (Worcester)	24106	24245	24922	24245	24525	1%

Other issues



11% of data for September came in after the deadline

A 1/3 of the data received (in time) from Schools (remaining 89%) came in on the 3 working days before timetable close

Over 5% of data that came in for September was incomplete and needed more information before processing

Automation (through iTrent) currently available to schools should be utilised further



Liberata HRP Transformation

Investment in significant structural changes designed to strengthen the current team.

Natalie Moss has commenced (01.11.21) as Senior Service Delivery Manager working across the Liberata locations working with Di Archer, Tosin Okanlawon & Amanda Lane in Worcester.

Helpdesk structure review, improvement in external communications with Customers and strengthening the engagement matrix.

Process review currently being performed across HR & Payroll to assess where improvements could be made.

Increased focus on Training and Accreditation.

Liberata HRP Automation



Investment in a Schools Portal – already being trialled in London (Hounslow) and live in Bromley & Croydon

Investment in an Orchestration layer (at final business case stage) that will bring the following enhancements :

- **Reduced rework** and failure demand
- Faster and more effective workflow with **reduced handoffs**.
- Increased efficiency of **processing and sending emails**.
- Reduced time measuring, **reporting** and analysing operations.
- Improved staff **utilisation**.
- Dramatically **improved data** to manage and optimise the operation.

Typically a system such as this drives increase in operational efficiency.



Our Ref: PR/NFF

Date: 28th September 2021

Dear Colleague,

School Funding Local Policy Direction 2022-23

The purpose of this letter is to share the DfE policy direction for school funding for 2022-23 and recommend the local policy direction for 2022-23.

On 8th July 2020, the Department for Education (DfE) issues a consultation detailing the next stages for implementing their National Funding Formula (NFF). The details are contained in the attached link: -

https://consult.education.gov.uk/funding-policy-unit/completing-our-reforms-to-the-nff/supporting_documents/Fair%20Funding%20For%20All%20Consultation.pdf

Details of the arrangements are summarised at **Appendix 1** and confirms that although the DfE have issued a stage 1 consultation document regarding their move to a 'hard' NFF, there is **no significant change proposed by the DfE for 2022-23**.

Given this position, and that for the 4 years 2018-19, 2019-20, 2020-21 and 2021-22, schools have supported the Local Schools Funding Formula (LSFF) to be based on the NFF parameters, de-delegation for maintained mainstream schools and for centrally retained services for all schools, **the LA is proposing to continue with the current arrangements for a further year for 2022-23**. By doing this the LA and schools will be able to move more readily into the DfE's 'hard' NFF when it is fully implemented in the future.

This approach was approved by the Worcestershire Schools Forum (WSF) at its meeting on 23rd September 2021.

The details of the current arrangements for 2021-22 to continue into 2022-23 are attached at **Appendix 2** together with the timeline for implementation.

If you have any comments on the proposed local policy for 2022-23 please email sfc@worcestershire.gov.uk.

With very best wishes,

Yours sincerely

A handwritten signature in black ink, appearing to read 'PR', with a small mark below it.

Phil Rook
Director of Resources

DfE CONSULTATION 8th JULY 2021

FAIR SCHOOL FUNDING FOR ALL: COMPLETING OUR REFORMS TO THE NATIONAL FUNDING FORMULA

SUMMARY OF THE KEY ISSUES AND IMPLICATIONS

Consultation closes 30th September 2021

Schools NFF

- Proposal to include all NFF funding factors for pupil-led and school-led in the hard NFF with no local adjustment.
- Premises factors (PFI, Split Site and Exceptional) to be reviewed to see if they can reflect actual costs – there will be a separate consultation on this.
- MFG to remain but could introduce local flexibility.
- EAL – LAs to use the EAL3 measure.
- Sparsity – continuing flexibilities on thresholds to remain
- Pupil Growth Funding and New School set up costs – data collection from LAs and introduce national standardized criteria for including in schools core NFF allocations – there will be further consultation on this.
- Timescales – **no new restrictions on LA formulae for 2022-23** but initiate initial movement of LA formulae closer to the NFF from 2023-24 by bringing each LA formula factor at least 10% closer to the NFF.

Implications for WCC/WCF –

- The factors subject to NFF should not cause an issue, given we follow the NFF parameters now and so this vindicates the policy of doing so and not having a HN top slice, by continuing this will be much better placed to implement the full hard NFF.
- Will need to see the detail on the proposals for premises factors as this could have implications for those schools.
- Will need to see the detail and criteria on the PGF as our system works well to enable us to target funding to those schools, we request to increase their PAN for basic need.

Central School Services

- Continue to fund statutory responsibilities that LAs hold for all schools centrally as well as continuing the national system for funding copyright licenses.
- Review of services subject to de-delegation – subject to a further technical consultation.
- Consider whether this becomes part of the Local Government Finance Settlement (LGFS) instead of in the DSG.
- Funding for Historic Commitments to be removed when the hard NFF is introduced.

Implications for WCC/WCF

- The implications for de-delegated and central services is unclear and so is the funding source – DSG or not?
- Significant implications for the EIFS which has already seen a 40% budget reduction and the likelihood the total DSG funding will be removed.

SEND Provision

- Still waiting for the national SEND review to report so nothing specific included.
- Reference to the schools NFF proxy indicators such as FSM, Low Prior Attainment, etc mentioned as needing national review.
- Block transfers to support SEND will no longer be possible under a hard NFF but DfE consider whether a new mechanism is required.

Implications for WCC/WCF

- As we follow the NFF for the proxy indicators no real issues unless the DfE significantly change the scope.
- No mention of there being a national definition for Notional SEN (the amount mainstream schools are allocated via the proxy indicators to support the first £6k of SEND provision) – this might be part of the national SEND review.
- Like all LAs significant budget pressures and awaiting the outcomes of the national SEND review.

Schools Forum Role

- Significant changes to existing roles and responsibilities and DfE to initiate a wider review of Schools Forums.

Implications for WCC/WCF

- Powers for local formula consultation, block movements, MFG setting and pupil growth fund decisions to be removed.
- Other powers for de-delegation, central services and SEND to remain.

Consistent Funding Year

- DfE want to explore the pros and cons of setting funding allocations for both maintained schools and academies on a consistent academic year basis.
- Maintained schools would be expected to account for their funding on a financial year basis (7 months and 5 months from each academic year).

Implications for WCC/WCF

- Will need detailed consideration by accountancy teams when the detail is known.

MATs Pooling of Funding

- No changes proposed to the current arrangements to permit this.
- No role for any equivalent of this in other parts of the education system.

PROVISIONAL DSG ALLOCATIONS 2022-23

Table 1 confirms the DSG Current 2021-22 compared to the DSG Provisional Allocations for 2022-23 for 3 of the DSG Blocks – Schools, Central School Services and High Needs. This is the **gross** DSG prior to academy and high needs places recoupment.

Table 1:
DSG Current 2021-22 compared to the DSG Provisional Allocation 2022-23

Detail	DSG Current 2021-22 July 2021 £'m	DSG Initial 2022-23 September 2021 £'m	Notes
SCHOOLS BLOCK			
Schools	369.495	380.128	A.
Pupil Growth Fund (PGF)	1.908	TBC	B.
TOTAL SCHOOLS BLOCK	371.403	380.128	
CENTRALLY SERVICES SCHOOLS BLOCK (CSSB)			
Central School Services	2.417	2.551	C.
Historic Commitments	0.960	0.768	D.
TOTAL CSSB	3.377	3.319	
HIGH NEEDS (HN) BLOCK			
Formulaic	68.038	74.746	E.
TOTAL	68.038	74.746	
TOTAL DSG SCHOOLS AND HIGH NEEDS	442.818	458.193	
Schools Block Guaranteed Units of Funding £			
Primary (PUF)	£4,407.42	£4,534.65	F.
Secondary (SUF)	£5,634.82	£5,803.59	F.

Notes on 2022-23 Provisional Allocations

A. This reflects the share of the NFF Year 5 on the parameters set out by the DfE (see below).

B. The PGF for 2022-23, to support basic need revenue costs, has yet to be confirmed as it requires the final October 2021 pupil census data.

C. Central School Services £2.551m for ongoing functions for Co-ordinated Admissions, Servicing of the Schools Forum, Retained Duties Former ESG and National Licenses and Subscriptions.

D. Ongoing Historic Commitments £0.768m for Early Intervention Family Support Service (EIFS). The DfE have started to unwind this funding for all LAs and have reduced all LAs allocations by a further 20% in 2022-23.

E. Reflects the share of the additional £780m.

F. The new Primary and Secondary Units of Resource (PUF) and (SUF) reflecting the DfE NFF Year 5. These will be applied to the October 2021 pupil census to calculate the Schools Block DSG for 2022-23, to be notified as part of the School Funding Settlement 2022-23 later in December 2021.

EXISTING ARRANGEMENTS FOR LOCAL SCHOOL FUNDING POLICY

1. For 2018-19, 2019-20, 2020-21 and 2021-22 schools and the WSF have supported the following: -

- The LSFF being based upon the DfE NFF parameters as far as is practicable and affordable subject to the Schools Block DSG available.
- No transfer of Schools Block DSG to the High Needs Block DSG to support cost pressures.
- Support the arrangements for delegation and de-delegation as detailed in **Table 1** approved by WSF maintained school members: -

Table 1: Delegation/De-Delegation Decisions for Maintained Mainstream Schools

Phase/Service [Formula Factor for De-delegation indicated]	Primary Delegation	Primary De-delegation	Secondary Delegation	Secondary De-delegation
School Specific Contingency (SSC) [Per Pupil (AWPU)]	No	Yes	No	Yes
Support for Schools in Financial Difficulty [Per Pupil (AWPU)]	Yes	No	Yes	No
Behaviour Support Services [Low Prior Attainment]	N/A	N/A	Yes	No
14-16 Practical Learning Options [Per Pupil (AWPU)]	N/A	N/A	Yes	No
Support for Minority Ethnic Pupils/ Underachieving Groups –	No	Yes	No	Yes
English as an Additional Language [EAL 3 Years] Traveller Children [Low Prior Attainment]	No	Yes	No	Yes
Free School Meal (FSM) Eligibility [FSM Annual]	No	Yes	No	Yes
Schools Insurance [Per Pupil (AWPU)]	Yes	No	Yes	No

Staff Costs/Duties Supply Cover –				
Civic	No	Yes	No	Yes
Trade Union	No	Yes	No	Yes
HR Related	No	Yes	No	Yes
[Per Pupil (AWPU)]				
Additional School Improvement Services	No	No	No	No
Former General Duties Previously Funded by the Former Education Services Grant (ESG)	N/A	No	N/A	No

- Support the arrangements for centrally retained services as detailed in **Table 2** approved by the WSF: -

Table 2: Centrally Retained Services Decisions for All Maintained Schools and Academies

For the LA to decide WSF approval is not required	<ul style="list-style-type: none"> • High Needs Block provision • Central Licences negotiated by the Secretary of State
CSSB WSF approval is required on a line by line basis NOT LIMITED by previous budget provision	<ul style="list-style-type: none"> • School Admissions • Servicing of Schools Forum • Services previously funded by the ESG retained duties that LAs hold for all schools
Other Services WSF approval is required	<ul style="list-style-type: none"> • Central early years block provision • Any movement of funding out of the schools' block • Any deficit from the previous funding period that reduces the amount of the school's budget • Any brought forward deficit on de-delegated services which is to be met by the overall school's budget
CSSB services	<ul style="list-style-type: none"> • Contribution to Combined Budgets Historic Commitments (Early

<p>WSF approval is required on a line by line basis LIMITED by previous budget provision</p>	<p>Intervention Family Support Service)</p>
<p>Approved to be centrally retained before allocating formula</p> <p>Subject to WSF approval including criteria where appropriate</p>	<ul style="list-style-type: none"> • Funding for significant pre-16 pupil growth to meet basic need and to enable all schools to meet the infant class size requirement
<p>No current provision made as no historic budget commitment or this has now time expired</p> <p>WSF approval is required on a line by line basis LIMITED by previous budget provision where NO NEW COMMITMENTS can be now entered into</p>	<ul style="list-style-type: none"> • Back-pay for equal pay claims • Remission of boarding fees at maintained schools/academies • Places in independent schools for non-SEN pupils • Prudential borrowing costs • SEN transport costs • Funding to support falling rolls to prepare for future population growth meeting specific criteria for good or outstanding schools where growth in pupil numbers is expected within 3 years • Capital Expenditure Funded from Revenue (CERA) • Existing Termination of Employment/ Redundancy Costs <p>[Note – there is no central budget provision for any of these areas]</p>

2. These have then been reported to the WCC Cabinet with all the consultation feedback for formal decision as required.

3. Given there is no significant change proposed by the DfE for 2022-23 and that previously there has been local support detailed above, it is proposed that the above current arrangements continue for 2022-23.

4. The timeline for implementation is detailed in **Table 3**.

Table 3: Timeline

DETAIL	DATE
Meeting of the WSF to discuss and agree continuing with the current arrangements in 2021-22 into 2022-23	23 September 2021
Meeting of the WSF to consider their decisions for de-delegated and centrally retained services	18 November 2021
Report to Cabinet making recommendations for the Local Schools Funding Formula (LSFF), de-delegated and centrally retained budgets for 2022-23	9 December 2021
Confirmation by the DfE/ESFA of: - <ul style="list-style-type: none"> • October 2021 census data and other 2021 data sets • Final LSFF Authority Proforma Tool (APT) for 2022-23 • DSG Allocations for 2022-23) Late) December) 2021
LA to consider impact of the new October 2021 data sets for LSFF APT submission for 2022-23	Late December 2021/Early January 2022
Meeting of the WSF to: - <ul style="list-style-type: none"> • Consider impact of the new October 2021 data sets • Agree submission for the final LSFF APT 2022-23 to the ESFA) 20) January 2022
LA to submit final data for Schools Budget DSG LSFF APT for 2022-23	21 January 2022
LA to confirm School Budget Shares 2022-23 for their maintained mainstream schools	By 28 February 2022
LA to confirm initial School Budget Shares 2022-23 for their maintained specialist providers	By 28 February 2022
ESFA to confirm General Annual Grant (GAG) 2022-23 to academies	By 31 March 2022

REPORT TO THE WORCESTERSHIRE SCHOOLS FORUM (WSF)
SCHOOL FUNDING 2022-23 LOCAL ISSUES –
WSF REQUIRED DECISIONS

1. PURPOSE

1.1 For the WSF to consider the parameters for the Local Schools Funding Formula (LSFF) for 2022-23. [Link](#) to DfE Tables updated 28 September 2021/

1.2 For the WSF to make required decisions under their responsibilities within the School Forum (England) Regulations 2012 in respect of: -

- The potential to transfer Schools Block DSG for 2022-23 to support High Needs pressures.
- De-delegation for maintained mainstream schools.
- Centrally retained services for all schools.

2. BACKGROUND

2.1 Following the WSF on 23rd September 2021 where the Government policy for the NFF and other school, funding matters for 2021-22 were discussed, the WSF endorsed and approved the continuation of the current local funding arrangements for 2021-22 into 2022-23.

2.2. This was confirmed in a detailed communication to all schools summarising the key national issues for 2022-23 together with the proposed local policy.

2.2 This included for 2022-23 the intention to continue with the LSFF based on the DfEs NFF Year 4 parameters, no transfer from the Schools Block to support High Needs and continuation of the existing arrangements for de-delegated services for maintained schools and centrally retained services for all schools.

3. ISSUES FOR CONSIDERATION

3.1 There were no responses received to the communication sent to schools.

3.2 The decisions to be made are as follows: -

- For the LSFF to continue with the existing LSFF based upon the DfEs NFF Year 4 parameters.
- No transfer of the Schools Block to support High Needs.
- Central Retention
 - For maintained schools support for current de-delegation to continue.
 - For all schools support for centrally retained services to continue.

3.3 In terms of the LSFF it is unclear at this stage whether the full DfE is affordable and this will be subject to further analysis when the Schools Funding Settlement 2022-23 is announced in late December 2021. This will be discussed further with the WSF at its meeting on 20th January 2022.

3.4 A summary of the recommended actions is detailed at **Appendix A**.

4. RECOMMENDATIONS

4.1 The WSF considers the issues for endorsement and decision for 2022-23.

4.2 The WSF to make required decisions under their responsibilities from the School Forum (England) Regulations 2012 in respect of Schools Block transfer, de-delegated and centrally retained services.

Phil Rook
Director of Resources
Worcestershire Children First

November 2021

WSF ENDORSEMENT AND DECISIONS FOR WCC LOCAL SCHOOL FUNDING POLICY FOR 2022-23

1. For 2018-19, 2019-20, 2020-21, 2021-22 and now 2022-23, schools and the WSF have supported the following: -

- The **LSFF for mainstream schools, both maintained and academies, being based upon the DfE NFF parameters** as far as is practicable and affordable subject to the Schools Block DSG available.
- **No transfer of Schools Block DSG for mainstream schools, both maintained and academies**, to the High Needs Block DSG to support cost pressures.
- The existing arrangements for **delegation and de-delegation, for maintained mainstream schools only**.
- The existing arrangements for **centrally retained services for all schools, maintained and academies**.

2. Given the policy direction from the DfE for 2022-23 and that previously there has been local support detailed above, **it is proposed that all the above current arrangements in paragraph 1 will continue for 2022-23.**

3. On this basis the WSF is requested to make the following decisions: -

3.1 Local Schools Funding Formula (LSFF)

To **endorse** the LSFF in 2022-23 for mainstream schools to continue as far is affordable and practicable to be based using the DfE Year 4 NFF parameters using the DfE required data sets with the formula factors and estimated units of resource in the DfEs NFF as detailed in the communication to schools.

To **note** the final decision on the NFF is for WCC Cabinet to take at its meeting on 9th December 2021.

3.2 Schools Block Transfer

The WSF considered its statutory responsibility in making a decision on the transfer of Schools Block Funding. In line with the Schools Forum (England) Regulations 2012, the WSF considered the issue.

To **not approve** any transfer in 2022-23 of Schools Block funding to support High Needs budget pressures.

3.3 De-delegation for Maintained Mainstream Schools

The WSF considered its statutory responsibilities in making decisions on the delegation or de-delegation of services currently centrally retained in the DSG. In line with the Schools Forum (England) Regulations 2012, the WSF maintained school members by phase considered these areas.

For the maintained school members by phase to **approve**: -

- The continued initial delegation and transfer of the following centrally retained services for 2022-23 as in 2021-22 as follows: -

FORMULA FACTOR	SERVICE
Basic Per Pupil	School Specific Contingencies (not early years) Support for Schools in Financial Difficulties 14-16 Practical Learning Options Schools Insurance Staff Costs Supply Cover Licences and Subscriptions
Deprivation	FSM Eligibility
EAL	Support for Minority Ethnic Pupils
Low Cost High Incidence SEN Prior Attainment	Support for Underachieving Groups Behaviour Support Services

- The delegation or de-delegation of these areas by reducing the formula amounts for maintained mainstream schools as follows in **Table 1**: -

Table 1: Delegation/De-Delegation Decisions for Maintained Mainstream Schools Only

Phase/Service [Formula Factor for De-delegation indicated]	Primary Delegation	Primary De- delegation	Secondary Delegation	Secondary De- delegation
School Specific Contingency (SSC) [Per Pupil (AWPU)]	No	Yes	No	Yes
Support for Schools in Financial Difficulty [Per Pupil (AWPU)]	Yes	No	Yes	No
Behaviour Support Services [Low Prior Attainment]	N/A	N/A	Yes	No
14-16 Practical Learning Options [Per Pupil (AWPU)]	N/A	N/A	Yes	No
Support for Minority Ethnic Pupils/ Underachieving Groups – English as an Additional Language [EAL 3 Years]	No	Yes	No	Yes
Traveller Children [Low Prior Attainment]	No	Yes	No	Yes
Free School Meal (FSM) Eligibility [FSM Annual]	No	Yes	No	Yes

Schools Insurance [Per Pupil (AWPU)]	Yes	No	Yes	No
Staff Costs/Duties Supply Cover – Civic Trade Union HR Related [Per Pupil (AWPU)]	No No No	Yes Yes Yes	No No No	Yes Yes Yes
Additional School Improvement Services	No	No	No	No
Former General Duties Previously Funded by the Former Education Services Grant (ESG)	N/A	No	N/A	No

3.4 Centrally Retained Services for All Schools

The WSF considered its statutory responsibilities in making decisions on other centrally retained DSG services. In line with the Schools Forum (England) Regulations 2012, the WSF considered these areas.

To **approve** the continued central retention in 2022-23 of the centrally retained services as detailed in **Table 2**, limited to the 2017-18 budget level or as prescribed by the DfE (indicative budgets are shown either limited to previous year levels or estimated funding subject to final clarification and change)

Table 2: Centrally Retained Services Decisions for All Schools Maintained and Academies

For the LA to decide WSF approval is not required	<ul style="list-style-type: none"> • High Needs Block provision • Central Licences negotiated by the Secretary of State – £0.41m estimated
CSSB WSF approval is required on a line by line basis NOT LIMITED by previous budget provision	<ul style="list-style-type: none"> • School Admissions – £0.6m estimated • Servicing of Schools Forum – £0.06m estimated • Services previously funded by the ESG retained duties that LAs hold for all schools – £1.26m estimated
Other Services WSF approval is required	<ul style="list-style-type: none"> • Central early years block provision – limited to existing DfE prescribed level • Any movement of funding out of the schools' block – nil • Any deficit from the previous funding period that reduces the amount of the school's budget – carry forward the deficit

	<ul style="list-style-type: none"> Any brought forward deficit on de-delegated services which is to be met by the overall school's budget – nil
<p>CSSB services</p> <p>WSF approval is required on a line by line basis LIMITED by previous budget provision</p>	<ul style="list-style-type: none"> Contribution to Combined Budgets Historic Commitments (Early Intervention Family Support Service) – £0.96m actual (reflecting the 2021-22 amount being reduced by a further 20% because of the DfE change to the Central Services Schools Block DSG)
<p>Approved to be centrally retained before allocating formula</p> <p>Subject to WSF approval including criteria where appropriate</p>	<ul style="list-style-type: none"> Funding for significant pre-16 pupil growth to meet basic need and to enable all schools to meet the infant class size requirement – yet to be advised by the DfE
<p>No current provision made as no historic budget commitment or this has now time expired</p> <p>WSF approval is required on a line by line basis LIMITED by previous budget provision where NO NEW COMMITMENTS can be now entered into</p> <p>[Note – there is no central budget provision for any of these areas]</p>	<ul style="list-style-type: none"> Back-pay for equal pay claims Remission of boarding fees at maintained schools/academies Places in independent schools for non-SEN pupils Prudential borrowing costs SEN transport costs Funding to support falling rolls to prepare for future population growth meeting specific criteria for good or outstanding schools where growth in pupil numbers is expected within 3 years Capital Expenditure Funded from Revenue (CERA) Existing Termination of Employment/ Redundancy Costs <p>Nil Provision for any of these areas</p>

3.5 General Issue

The WSF considered the need to exercise its responsibilities to inform the County Council Cabinet of the issues discussed and decisions for the 2022-23 LSFF, WSF decisions on transfer from the Schools Block, delegation/de-delegation for maintained schools and other centrally retained services for all schools.

To **approve** that all these above decisions be communicated to the Worcestershire County Council Cabinet as required.



Department
for Education

Reforming how local authorities' school improvement functions are funded

Government consultation

Launch date: 29 October 2021

Respond by: 26 November 2021

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Introduction

The purpose of this consultation is to seek views about proposed changes to how Local Authorities' school improvement activities are funded.

Who this is for

- Local Authorities
- Schools and parents
- Any other interested organisations and individuals

Issue date

The consultation was issued on 29 October 2021.

Enquiries

If your enquiry is related to the policy content of the consultation you can contact the team on:

SIMBgrant.consultation@education.gov.uk

If your enquiry is related to the DfE e-consultation website or the consultation process in general, you can contact the DfE Ministerial and Public Communications Division by email: Consultations.Coordinator@education.gov.uk or by telephone: 0370 000 2288 or via the [DfE Contact us page](#).

Additional copies

Additional copies are available electronically and can be downloaded from [GOV.UK DfE consultations](#).

The response

The government's response to the consultation will be [published on GOV.UK](#) in December 2021 / early January 2022.

About this consultation

We would like to hear your views on our proposals to:

- **Remove** the School Improvement Monitoring & Brokering Grant ('the Grant'), which is currently allocated to local authorities to support school improvement activities; and
- **Make provisions** within the School and Early Years Finance (England) Regulations for the financial year (FY) 2022-23 to allow local authorities to fund all of their school improvement activity (including all core school improvement activities) via de-delegation from schools' budget shares.

Respond online

To help us analyse the responses please use the online system wherever possible. Visit www.education.gov.uk/consultations to submit your response.

Other ways to respond

If for exceptional reasons, you are unable to use the online system, for example because you use specialist accessibility software that is not compatible with the system, you may download a word document version of the form and email it or post it.

By email

- SIMBgrant.consultation@education.gov.uk

By post

SIMB grant consultation
Department for Education
Agora Building
3 Cumberland Place
Nottingham
NG1 6HU

Deadline

The consultation closes on 26 November 2021.

Reforming how local authorities' school improvement functions are funded

The local authority (referred to here as 'council') role in school improvement has changed significantly in recent years, with the growth of school-led approaches, such as Multi-Academy Trusts (MATs), putting school improvement in the hands of the strongest schools and school leaders. In turn, the council's role in school improvement in maintained schools is increasingly focused on helping those of their schools that need it, to access the support they need from the school system.

Given these changes in the respective roles and responsibilities of different parties in the school system, we believe now is the right time to revisit councils' school improvement functions and how they are funded, and consider what this means for the future of the School Improvement Monitoring & Brokering Grant.

Background: Councils' school improvement functions and how they are currently funded

Councils' school improvement activity can be divided into their '**core improvement activities**' and '**additional improvement services**' which councils may opt to provide to maintained schools with their agreement.

Core improvement activities

Since 2017, the Grant has been provided to support councils to fulfil their core improvement activities, with the amount received by each council proportionate to the number of maintained schools in their area.

These core improvement activities are set out in Part 4 of the [Education and Inspections Act 2006](#) (the 2006 Act) and on page 36 of our [Schools Causing Concern guidance](#). Part 4 of the 2006 Act provides councils with statutory powers to warn and intervene in schools causing concern, through issuing a warning notice setting out actions the governing body are to take – with powers to require the governing body to enter into arrangements; to appoint additional governors; to provide for the governing body to consist of interim executive members; or to suspend the right to a delegated budget, if the governing body fails to take the required action.

The Schools Causing Concern guidance sets out expectations that councils should:

- Understand the performance of maintained schools in their area, using data as a starting point to identify any that are underperforming, while working with them to explore ways to support progress;

- Work closely with the relevant Regional School Commissioner (RSC), diocese and other local partners to ensure schools receive the support they need to improve;
- Where underperformance has been recognised in a maintained school, proactively work with the relevant RSC, combining local and regional expertise to ensure the right approach, including sending warning notices and using intervention powers where this will improve leadership and standards; and
- Encourage good and outstanding maintained schools to take responsibility for their own improvement; support other schools; and enable other schools to access the support they need to improve.

We recently implemented changes to ensure that, in delivering these core improvement activities, councils receiving this grant are supporting educational recovery from the pandemic, and to also adjust the overall value of the Grant to reflect the reduced number of schools for which councils are now responsible.

Additional improvement services

Since 2017 councils have also been permitted, with the agreement of their local schools forum, to de-delegate funding from their schools' budget shares, to fund the provision of additional improvement services. These are activities that go above and beyond their core improvement activities, and may include, for example, providing or funding access to improvement support. Many councils will also provide additional improvement and other services to schools on a traded basis, where school leaders choose to buy in services provided by the council.

Proposal and rationale

The current funding arrangements for council school improvement activity presume that there is a clear distinction between core improvement activities, for which the Grant is provided, and additional activity, which councils fund through de-delegation or as a traded service. We believe this distinction no longer reflects the reality of how effective councils operate.

Rather, we believe that, in practice, activity connected to their core improvement activities forms part of a continuum of wider improvement activity that councils may choose to undertake. This is understandable: councils will want to act before performance deteriorates significantly and formal intervention becomes an inevitability, for example, by putting in place arrangements to spot signs of potential underperformance early and challenge it; and only moving on to formal intervention through warning notices and further intervention powers where this hasn't worked and performance has deteriorated.

In that context, and taken together with the Secretary of State's responsibility to convert the poorest performing maintained schools (that Ofsted has judged 'Inadequate') into academies (for which the council is no longer responsible), it is unsurprising that whilst the vast majority of councils continue to spend the full value of the Grant, instances of councils exercising their intervention powers remain relatively low. This is reflected for example in the number of warning notices issued by councils – with less than 1 in 5¹ councils issuing a warning notice in each of the last 3 years. In turn, this implies that the Grant is predominantly used on early challenge and support in cases of potential underperformance, rather than use of formal intervention powers.

We recognise that councils are best placed to determine how to fulfil their core improvement activities but, as a result, we believe there is a strong case to reflect this reality in reformed funding arrangements for councils' improvement functions.

To achieve this, we are consulting on proposals to remove the Grant and enable *all* improvement activity, including that provided in connection with their core improvement activities, to be funded in the same way via de-delegation from schools' budget shares.

We see a number of benefits to this:

- It will remove the distinction set out above, which does not reflect the reality of how effective councils operate.
- In line with our drive towards a school-led improvement system, it will put more decisions about improvement provision to schools into the hands of school leaders (via schools forums). With an average uplift in next year's provisional core school funding allocations of 3.2%, as the beneficiaries of improvement support from councils, we believe it is right that they contribute to the cost of such support but, in turn, they should have greater influence over the activity undertaken.
- It will bring funding arrangements for councils' improvement activity closer into line with the relationship between individual academies and their MATs, which normally top-slice funding to secure improvement support; and support our overarching policy of ensuring maintained schools and academies are funded on an equivalent basis. In turn, this will help to deliver a core aim of the National Funding Formula (NFF), which is to support a more school-based system that allows schools maximum control over their funding.
- It will also enable councils to adjust over time to the government's longer-term ambition for all schools to become academies within a strong MAT – an end point

¹ According to data held by Ofsted

which a number of councils are already closing in on, where councils would no longer maintain schools. We believe that moving at this time to funding these responsibilities via de-delegation, in the same way that councils fund additional improvement services they provide to maintained schools, will provide a smoother transition for councils in this position.

We propose to effect this change through, (1) removing the Grant over the course of FY 2022-23, and (2) including provision in the School and Early Years Finance (England) Regulations for FY 2022-23 which would allow councils to de-delegate for all improvement expenditure, including all core improvement activities. This consultation seeks views on the impact of both these proposals. In addition, this consultation asks how we can update government guidance to support these changes.

Proposal 1: Removing the Grant

We believe the distinction our current funding arrangements effectively make – providing an additional grant to councils to support core improvement activities, with additional improvement services funded via de-delegation and traded services - no longer reflects the reality of how councils deliver improvement support to maintained schools, with formal intervention in reality only a small part at the end of a continuum of challenge and support provided by councils. This means funding to support core improvement activities and formal intervention overlaps with wider improvement provision in a way which creates a disparity with how improvement provision is funded in MATs.

Subject to the outcome of this consultation, we are proposing that the Grant would therefore be ended with effect from the start of FY 2023-24, phased so that it would be reduced to 50% of the current amount on a per school basis in FY 2022-23 to give councils and maintained schools time to adjust to these new arrangements.

Going forward, in fulfilling their responsibilities for the schools they maintain, councils will continue to be able to draw on wider improvement support that the Department for Education ('the Department') makes available at low or no cost, including our network of curriculum and behaviour hubs, Teaching School Hubs, National Professional Qualifications providers, Early Career Framework reforms, and our offer of funded support from a National Leader of Education for any school that Ofsted judge 'requires improvement'.

Proposal 2: Including provisions in the School and Early Years Finance (England) Regulations to enable councils to fund all core improvement activities via de-delegation

We recognise that, as well as those improvement functions which MATs undertake for academies, part of a council's core functions will continue to be to exercise its statutory

intervention powers as appropriate over maintained schools, for which councils cannot currently de-delegate. While instances of councils exercising their statutory intervention powers remain relatively low, we do intend to ensure they remain adequately funded for this, as well as their other improvement functions.

Paragraph 8 in Schedule 1 to the School and Early Years Finance (England) Regulations (the Regulations) that apply to FY2021-22 currently prohibits councils from using Dedicated Schools Grant (DSG) funding for expenditure connected to their statutory improvement functions under Part 4 of the 2006 Act. Paragraph 54 in Part 6 of Schedule 2 to the Regulations currently permits councils to de-delegate expenditure on improvement “that is not required by Part 4 of the Education and Inspections Act 2006” from schools’ budget shares, with the agreement of their local schools forum or the Secretary of State.

From FY 2022-23, we propose to give councils the power in the Regulations to fund all improvement activities, including their core improvement activities, via de-delegation of funds from schools’ budget shares, with the agreement of their local schools forum or the Secretary of State.

In practice, we propose doing this by omitting the existing provisions in paragraph 8 in Schedule 1 and paragraph 54 in Part 6 of Schedule 2 of the Regulations from the Regulations for FY2022-23, and including a new provision in Part 7 of Schedule 2 – items that may be removed from maintained schools’ budget shares (primary, secondary and special schools, and pupil referral units) – permitting councils to deduct expenditure incurred for the purposes of improvement, *including* that required by the council’s functions under Part 4 of the 2006 Act, from schools’ budget shares, with the agreement of their schools forum or the Secretary of State.

In line with other de-delegation decisions, the Secretary of State would retain the power to approve the de-delegation contrary to the decision of the schools forum, if satisfied that the council had demonstrated such de-delegation was necessary to ensure the council is adequately funded to exercise core improvement activities.

As set out above, this would support our overarching responsibility to ensure maintained schools and academies funding arrangements are more closely aligned; and would provide a smoother transition as more schools become academies and move out of council control.

Making this change would also align with the proposed reforms to the NFF on which the government has recently [consulted](#). That consultation proposed reviewing central school services with a view towards retaining funding by central grant as part of the Central School Services Block where responsibilities are to all schools, and de-delegating central functions that are provided only in support of maintained schools. The Department plans to consult further as part of the review of which council functions should remain discharged by the council or move to be de-delegated or traded.

Clarifying guidance provided to councils with respect to school improvement

As part of these changes, we would also intend to update guidance provided to councils with respect to their improvement activities in maintained schools, to ensure guidance reflects these new funding arrangements.

We are therefore keen to use this opportunity to seek views on where guidance can usefully be clarified to aid understanding of what councils are accountable for with respect to improvement, where these activities can be scaled in response to need, and the scope for councils and schools' forums to agree how these responsibilities are carried out and funded. For example, we are keen for views on how we might best update our Schools Causing Concern guidance.

Timeline

Subject to the outcome of this consultation, our proposed timeline would be to make these changes to the School and Early Years Finance Regulations for FY 2022-23, allowing for a phased removal of the Grant over the course of FY 2022-23 – at the end of which it would be expected that all council school improvement activity, including core improvement activities, will be funded via de-delegation, with any non-statutory services which councils choose to continue to offer either provided on a traded basis or also funded through de-delegation.

Table 1 Proposed timeline for implementation

Date	Proposal
October 2021	Government consultation launched on proposals for reforming how councils' improvement functions are funded.
December 2021 / early January 2022	Government publishes its response to the consultation, confirming its intentions.
December 2021 / January 2021	Councils agree de-delegation for FY 2022-23 with their schools forums. Provisions made within the School and Early Years Finance (England) Regulations allowing councils to de-delegate to fund all improvement activity, including core improvement activities, from FY 2022-23 onward. Amendments made to relevant government guidance relating to council school improvement activity.
By April 2022	School and Early Years Finance (England) Regulations 2022-23 come into effect, allowing councils to de-delegate for all council school improvement functions.
April 2022	The Grant is reduced by 50% on a per school basis.

Date	Proposal
April 2023	The Grant is removed entirely.

Questions

Question 1: We believe that instances of councils exercising formal intervention powers remain relatively low, and that since its introduction, this grant has primarily supported improvement functions such as early support and challenge to improve individual school performance, which overlaps with wider (non-core) improvement provision.

Do you agree that this is the case? If not, please explain.

Question 2: We are proposing to (i) remove the Grant (Proposal 1), and (ii) enable councils to de-delegate funds via their schools forum to ensure they are sufficiently funded to exercise all of their improvement activities, including all core improvement activities (Proposal 2).

Do you agree that, taken together, these proposals will allow councils to continue to ensure they are adequately funded for core improvement activities; and therefore do not impose a new burden? If not, please explain.

Question 3: Bearing in mind Proposals 1 and 2, are there any aspects of our guidance to councils on their role in school improvement which could usefully be clarified to aid understanding of what councils are accountable for with respect to improvement and how it should be funded? (For example, our Schools Causing Concern guidance.)

Question 4: The Public Sector Equality Duty (PSED) requires that public bodies consider the potential effects of key decisions on groups with protected characteristics. The relevant protected characteristics for the purposes of the PSED are: sex; race; disability; religion or belief; sexual orientation; pregnancy or maternity; gender reassignment; and age.

Please let us know, providing evidence where possible, if you believe any of the proposals set out in this consultation will have the potential to have an impact on specific groups, in particular those with relevant protected characteristics.



Department
for Education

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Worcestershire Allocations 2021/22 - £413k

April – Aug 2021 £184k

Sept – March 2022 £229k

News | Education, Financial management

Authorities ‘disappointed’ at proposed scrapping of school grant

By: Oliver Rudgewick | 5 Nov 21

The government’s proposals to scrap a £50m school improvement grant has been criticised by local authorities, with education budgets already stretched.



Image © Stock

Currently councils’ improvement activities, which include interventions in under-performing schools, are supported through the School Improvement Monitoring and Brokering Grant.

However, a consultation from the Department for Education has proposed a phased removal of the grant, with all future improvements funded from the school’s own budgets.

The consultation stated: “The local authority role in school improvement has changed significantly in recent years, with the growth of school-led approaches, such as multi-academy trusts, putting school improvement in the hands of the strongest schools and school leaders.

“In turn, the local authority role in school improvement in maintained schools is increasingly focused on helping their schools access the support they need from the school system.”

“We believe now is the right time to revisit councils’ school improvement functions and how they are funded, and consider what this means for the future of the school improvement monitoring and brokering grant.”

The DfE has proposed reducing the grant by 50% next year, to give councils and maintained schools time to adjust, before it is removed in 2023-24.

In order to allow for interventions to be funded from the dedicated schools grant, the government has proposed amending current regulations.

The proposals were met with a lukewarm response from the sector.

Anntoinette Bramble, chair of the Local Government Association’s Children and Young People Board, said: “We are disappointed that the government is considering removing a grant that councils use to support and facilitate school-to-school improvement, as well as asking schools to pay for this support when their budgets are already stretched.

“Councils have played a crucial role supporting all schools during the pandemic, which the proposed changes risk undermining.

“They retain the majority of their legal obligations to promote high standards of education in their areas but now have to rely on schools to fund these duties from their own over-stretched budgets.”

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Agenda Item 10 – High Needs Update

High Level Needs – Developments and Measuring Impact

The High Needs Block of DSG continues to show significant financial pressure, in line with national and local issues.

Period 6 end of September Financial Update

As at P6, the Forecast variance for the High Needs Block was an overspend of £6.034m (10.2% of budget). This is a reduction on the previous month – an improvement of £0.167m. The decrease in School-age spend is due to a small drop in Independent Placement numbers.

The table below shows the spend and variance at service level. Note the large variances in both School-Age and Post-16 areas of the budget, despite the improvement for P6:

Service Area	Budget (£)	Forecast (£)	Variance (£)	Change since last month (£)
HN Early Years	850,000	815,924	-34,076	0
<i>The Early Years area of the High Needs Block is currently forecast to underspend by £34k. The contracts for Outreach forecast to spend to budget. The current underspend forecast is largely down to lower Nursery Fees expected to be recharged from Social Care. In terms of overall Early Years placements, the service expects numbers to stay fairly static, i.e. new starters will be broadly equivalent to the number moving to School Age.</i>				
HN School Age	38,930,700	42,127,590	3,196,890	-251,607
<i>Forecast for School Age includes an estimated figure for growth for the remainder of the Financial Year as the service relies increasingly on OOC places in order to meet the demands caused by the peak in new EHCPs from 2020.</i>				
HN Post-16	7,355,786	11,806,349	4,450,563	-76,759
<i>The number of pupils with an EHCP transitioning into FE settings each year at the age of 16-18 has increased significantly over the period of 2016 to 2020 by 60%. This accounts for 299 learners in 2016 to 734 in 2020. The forecast for the next academic year and following year is likely to remain the same based on the numbers of children currently with an EHCP. Forecast is for similar growth to last 2 years as number of new entrants remains around 730. £9.2m of the £11.9m total spend is in Specialist Post-16 (ISP) settings, highlighting the reliance on this establishment type in the Post-16 category. The average annual cost of these placements is around £38k per pupil, compared to around £5k per Pupil for Post-16 FE Colleges and 6th Forms.</i>				
HN Other Settings	4,035,000	3,811,668	-223,332	640
<i>The majority (£3.5m) of spend in this budget area relates to PRUs, which are forecast based on existing commissioned places and are not considered to be a volatile spend area.</i>				
Other HN	4,802,300	4,843,538	41,238	35,202
<i>Personal Budgets - no growth forecast at present. Service intends to do a full review of Personal Budgets. £4.5m of this budget area is the payment to WCF for Learning and Achievement Services in the Core WCF Contract.</i>				
HN Resource Bases	1,121,000	1,723,862	602,862	125,384
<i>This includes MABS, Speech and Language Units, Early Years Language Units and Nurture Groups. The forecast for Early Years Language Units includes the additional locations that are to be procured from September 2021.</i>				
HN Therapies	180,000	180,000	0	0

Currently forecast at similar levels to previous 2 years

HN Contingency	2,000,000	0	-2,000,000	0
Total	59,274,786	65,308,932	6,034,146	-167,140

The forecast of £65.3m expenditure follows the pattern of increasing High Needs spend over recent years. The table below shows that the forecast for HNB spend for this year is an increase of £9.5m compared to 2020/21. This would represent the largest cash increase in the spend for the block within the timeframe of comparable data. Over the five-year period shown below HNB spend has increased by 54% since 2017/18 baseline.

Financial Year	Total HNB Spend (£)	Change from PY (£)
2017/18	42,361,000	
2018/19	48,880,000	6,519,000
2019/20	52,314,217	3,434,217
2020/21	55,828,176	3,513,959
2021/22	65,308,932	9,480,756

Returning to the in-year position, the tables below show in P6, the number of known Worcestershire-funded placements dropped slightly to 4,182. Note that funded placements do not equal EHCP figures for Worcestershire that may be reported elsewhere. This is because responsibility for maintaining EHCPs may sit with Worcestershire whilst funding responsibility sits with another local authority, and vice-versa.

Banding	No. of Current Pupils							
	A Mainstream	B Special	C Independent	D Post-16	F IAR	H Hospital	I SWS	Total
Band - Exceptional 1	366	390	0	0	0	0	0	756
Band - Exceptional 2	662	747	0	0	0	0	0	1,409
Band - Exceptional 3	292	343	0	0	1	0	0	636
Band - Exceptional 4	26	166	1	0	0	0	0	193
Band – LU Ordinarily Available	32	0	0	0	0	0	0	32
Band - Ordinarily Available	42	10	0	0	0	0	0	52
Band - Unpredicted	24	23	0	0	0	0	0	47
Non-Banding	0	0	280	601	157	14	5	1,057
Total	1,444	1,679	281	601	158	14	5	4,182

	No. of Current Pupils							
	A Mainstream	B Special	C Independent	D Post-16	F IAR	H Hospital	I SWS	Total
May-21	1,444	1,679	267	572	146	12	5	4,125
Jun-21	1,444	1,679	269	558	149	12	5	4,116
Jul-21	1,444	1,679	269	558	149	12	5	4,116
Aug-21	1,444	1,679	286	609	151	13	5	4,187
Sep-21	1,444	1,679	281	601	158	14	5	4,182

The marginal improvement in the P6 position is partial attributable to the small drop in placements, but also a slight reduction in the 'Current Average Annual Cost' per placement, which is now at £9,467 – lowest since the start of the financial year. However, it is too early to attribute this to any specific area of the HN Management Plan.

	Current Average Annual Cost (£)							
	A	B	C	D	F	H	I	Total
	Mainstream	Special	Independent	Post-16	IAR	Hospital	SWS	
May-21	4,988	6,756	43,501	13,494	10,964	975	22,944	9,602
Jun-21	4,988	6,756	43,164	13,768	10,693	975	22,944	9,611
Jul-21	4,988	6,756	43,164	13,768	10,693	975	22,944	9,611
Aug-21	4,988	6,756	46,904	12,450	10,809	900	22,944	9,864
Sep-21	4,988	6,756	43,952	11,750	9,530	836	22,944	9,467

The current annual costs is considered to be the main driver of both current HNB variance and the largest opportunity for the Management Plan to impact the financial sustainability of HNB.

The HNB Management Plan Update

Principally the cluster of developments and activities are to deliver the following aspirations

- More of our SEND children and Young People are in mainstream provision
- Increased attendance levels for SEND CYP
- Narrowing the attainment gap
- Meeting needs locally
- Positive outcomes and good preparation for adulthood
- Holistic assessment and meeting of needs

In addition, it is to provide assurance on value for money by analysis of cost relation to outcomes achieved and the need for effective cost control ensuring ongoing budget sustainability.

The Key Initiatives and developments in no particular order, are:

- Locality Hubs & Panels
- Section 19 (arrangements for education provision for those not able to access their education for a period)
- Top Up Funding
- Therapies
- Specialist Provision Plan
- Placement Plans & Commissioning
- Year9+ Annual Reviews & PFA Plans

By working collectively with these supporting initiatives, we can achieve improved outcomes for individual children and young people and manage down costs to ensure effective use of the limited resources and increased equity to those resources to meet needs locally.

To ensure we are achieving this, we need to have a shared understanding of where we are, what we want to achieve and be able to measure progress towards achieving them. Becoming mutually accountable to each other and able to further identify effective interventions to deliver the aspirations, impacts and value for money.

We have to this end started to develop an outcomes and impact framework. The next step will be identifying the measurement systems and reporting mechanism and establish baselines to measure progress against.

Development	Locality Hubs and Panels			
Aims	Impact	Measurement	Timescale of delivery	Progress & milestones
Early Intervention to meet need by creating a process that supports schools to meet the needs of pupils with SEND but no EHCP. Schools will be able to raise issues and request support from a local panel of practitioners.		School feedback on experience	12 months	6 month review
Right Help at the right time				
Preventing the need for EHCP		Reduction in new EHCP requests from school age CYP (non transition points)	12 months	Termly monitoring and reporting
Encouraging holistic approach Multi professional teams will work together to consider issues raised by local schools and offer information, advice and guidance. This can be school to school support, signposting to resources, traded services and training offers, and in some cases an allocation of funding to deliver target outcomes for an individual pupil.		Dip sample audit of cases School feedback sample	12 month	6 month check and report
Keeping CYP in their local community with their peers	More children remaining in	Requests for change in provision from mainstream to special	Anticipate impact not seen till 12 months	

Development	Section 19 - (arrangements for education provision for those not able to access their education for a period)			
Aims	Impact	Measurement	Timescale of delivery	Progress & milestones
Reduce absence rates of those not accessing Education	CYP have minimum disruption to their education	Number of "lost days" reduced	12 month	Termly data
Reduce time from not accessing to provision made	CYP have minimum disruption to their education	Point of exit from education to alternative provision in place	12 month	Termly monitoring Annual analysis
		AP return rates to mainstream and specialist provision (including Special Schools)	12 month	
Improve attendance rates of EHCP CYP	Increased in the number that return to mainstream provision			

Development	Top Up Funding			
Aims	Impact	Measurement	Timescale of delivery	Progress & milestones
More CYP remain in mainstream and local special schools	Reduction in the number of out of county placements	Annual analysis	12 months	Termly tracking
Reduction in mid-year placements change requests	Reduction in spend in ISP greater than Top up investment	Placement cost tracking	12 months	Termly report
Improved forecasting HLN	cost control Reduction in expenditure	HLN budget management	12 months	Monthly budget report

Development	Therapies			
Aims	Impact	Measurement	Timescale of delivery	Progress & milestones
Therapy needs met in timely way to increase opportunity for positive impact	Increased outcomes achieved	TBC – need to track via annual reviews	Annual	Parent carer survey? Sample Case tracking?
Reduction in spot purchase	Improved planning and		annual	Develop monitoring &

	increased value for money			tracking process
Reduction in delay accessing Therapeutic services	Increased satisfaction			Parent carer survey
Increase in Joint funding (Section 75)				
Increase in personal budget	Increased confidence in EHCP process – focus on outcomes not provision	TBC – need to track via annual reviews	annual	

Development	Specialist Provision Planning			
Aims	Impact	Measurement	Timescale of delivery	Progress & milestones
Increased local choice	More CYP in local provision	Reduction in post 19 in ISP	1-2 years	
Increased confidence in local provision		Reduction in ASD CYP in ISP	3 years	
Reduction in Tribunals re ISP provision		Reduction number of CYP with sensory impairment in ISP	2 years	

Development	Placement Plans & Commissioning			
Aims	Impact	Measurement	Timescale of delivery	Progress & milestones
Best value for money equity in access to funding	Funding used to achieve outcomes for more CYP	Reduction in out of area placement costs	1-2 years	Report on value for money Expenditure and outcomes
Reduction in Costs and effective Cost control				
Shared understanding on purpose and duration of placement	Improved parent carer relationship Evidence of outcomes for additional expenditure	Annual report	1-2 years	Placement tracker on outcomes to compliment financial tracker
Reduction/capping of individual placement costs	Increased value for	Budget monitoring		

	money, cost control			
Improved relationship with providers to be consistent with our strategy and aspirations				
WCF-wide Commissioning Hub embedding good practice from Social Care Placements into SEND Placements	Deliver the above ensuring both positive outcomes and value for money			

Development	Year9+ Annual Reviews & PFA Plans			
Aims	Impact	Measurement	Timescale of delivery	Progress & milestones
Improved planning	Reduction in late decision making		1-2 years	Need to establish a system to measure
More post 16 local placements	Reduction in out of County & ISP provision	Placement breakdown	1-5 years	Annual report
	Increase in % of supported living compared to residential for 18-25 year olds		1-2 years	Annual report
	Increased levels of employment	% of disabled people in employment		
	YP achieve their aspired destination			Develop destination tracking from new annual review return form

Recommendations for informing and engaging Schools Forum:

1. Baseline measurements are established within the next 3 months and shared with School Forum.
2. That there is a bi-annual report capturing the impact, outcomes, budget/costs on the initiatives shared at school's forum.
3. Each year one or two developments could be subject to a deep dive on the effectiveness to gain greater shared understanding to what's creating the successes and the barriers to success.

4. At this stage there is an avoidance of target setting until there is increased understanding of the enablers and the barriers to achieving the aims and associated impact measurements. We will work to assurance on direction of travel, upward and down trends are being achieved.



f40 Executive Committee Meeting

Monday, September 20, 2021 – Conference call

1. Attendances, apologies, and changes to committee membership

Present: Cllr James McInnes (Chair, Dep Leader at Devon CC); Emily Proffitt (Staffs primary headteacher and Dep Chair); Karen Westcott (Secretary); Margaret Judd (Dorset Council); Andrew Minall (Hampshire CC); Jackie Smith (CEO Brunel SEN MAT & Uplands Educational Trust); Carole Thomson (Oxfordshire Schools Forum); Richard Soper (Worc Community Trust); Julia Harnden (ASCL); Cllr Bryony Goodliffe (Cambs CC); Cllr Alex Dale (Derbyshire CC); Ed Francis (Worc SEND primary headteacher); Dominic Muns (Wiltshire Council); Cllr Shellina Prendergast (Kent CC); Cllr Fiona Baker (West Northants Council); Jon Fisher (East Riding of Yorks Council).

Apologies: Cllr Bob Standley (East Sussex CC); Deborah Myers (East Riding of Yorks Council); Annette Perrington (Swindon BC); MP Layla Moran (Lib Dem Vice Chair); Laura Mayes (Wiltshire Council).

JMcl welcomed new members to the meeting.

2. Declarations of interest.

KW declared an interest in agenda item number 15 – The Re-tendering of the Secretariat Role – and said she would be leaving the meeting before the issue was discussed.

3. Minutes of the meeting held on 14 June 2021

The minutes were **APPROVED** as a correct record of the meeting.

4. Notes of the meeting with the DfE in June 2021 - noted

5. Annual report issued to the LGA - noted

KW updated members on the new guidelines for Special Interest Groups within the LGA and 7qhow SIGS, such as f40, were now only permitted to be established for five years. Should they wish to continue after that they will be asked to make their case to the Leadership Board for continuation when they submit their annual report. For all existing SIGs, the five-year period will end in summer 2024.

It was agreed that members should discuss the issue at a later date.

6. f40 response to the DfE consultation on the National Funding Formula – presentation by Andrew Minall

AM presented f40's draft response on the DfE consultation on the National Funding Formula, as drafted following a meeting with the Finance Managers' Research Team. He said the questionnaire had been difficult to answer in some respects because some questions did not allow for comments and only allowed for 'yes', 'no' or 'unsure' answers as to whether or not you agreed with the DfE statement or suggestion.

He said where f40 had not wholly agreed with the DfE suggestion, it was proposed the response should be 'no'. AM said f40 preferred to use a 'yes' or 'no' answer so that there could be no mistaking on the views of the group.

He said there was an opportunity to comment at the end, which could be used to explain f40's concerns and suggestions.

However, CT said she had discussed the consultation with the Oxfordshire Schools Forum and it had agreed to use the 'unsure' option for some questions where there were caveats around the response.

CT also said on Question 14 that Oxfordshire Schools Forum agreed with the DfE that teachers pay was a 'significant' element of the education budget for mainstream primary and secondary schools, and that its significance could not be questioned, as f40 had suggested in their draft response.

AM agreed it was a significant element of the budget but said there were other significant areas of spend, too, with around less than half of overall education budgets going on teacher salaries. He said he would amend the wording in the f40 response to agree that teachers' pay was **one** of the significant elements, alongside some others.

Members agreed to pass the draft response, with the slight amendment made to question 14.

Action: KW to circulate the amended submission to members of the Executive for their comments.

Action: KW to submit the final submission to the DfE consultation on the National Funding Formula, and then to circulate it to all members of f40.

7. f40 survey of members on use of SEND budgets

AM informed members about a meeting held that morning between members of the f40 Finance Managers' Research Team (FMRT). He said members of the FMRT had agreed that a survey should be circulated to members, looking at:

- Sufficiency of places
- Early intervention / triage of SEND
- Post 16 provision
- Core provision – ages, unit costs etc

AM said the purpose of the survey would be to enable members to share best practice, expertise and experience around how their SEND budgets are spent and how different local authorities provide support, looking at provision of special school placements and inclusivity of mainstream schools.

JS said she would be happy to get involved in the survey and provide support.

JS said the number of special school places was growing all the time, but it was vital for mainstream schools to be more inclusive, as well. She said the population in Swindon was increasing, therefore, the number of children with SEND was rising, and more special school places were required.

She said where children could not be included in mainstream schools, or where it was detrimental to include them, special school places needed to be provided. She said the issues with SEND were around:

- Dwindling budgets
- Increasing complexity of need
- Growth in numbers of children with SEND

JS said it required intricate place planning.

WF agreed with JS and said the needs of children were becoming much more complex. He said he believed more children were being born with SEND and he believed more and more children with additional needs were being taken out of mainstream schools, due to Covid and the fact that parents now had a choice.

MJ said she believed there needed to be full understanding of when new special schools were required and when children with SEND should be included at mainstream schools.

EP said, from a mainstream perspective, 15% of pupils had special needs. She said it was difficult to provide the right level of support to all pupils because the support was targeted towards the highest needs.

She said where schools were unable to provide the right level of provision or support, special school places should be provided. She said decisions on SEND support should be made for the right reasons.

AM said he believed the issue was around trying to work out where the true need was. Based on projecting the current level of growth, by 2043, Hampshire would reach a point where children may not need mainstream schools because all children would need to be in a special school. Clearly that is not the case and while there are some objective reasons for growth in the SEND population, we need to get to a new point of stability.

JH said the high needs formula needed to be reviewed as a matter of urgency. She said the Government review on SEND needed to be published.

JS said population growth and increasing complexity were creating a changing situation. She said the percentage of children with SEND was increasing – as was the number of people with SEND now being identified.

She said as the population grew, we built more mainstream schools. However, she said more special schools also needed to be built.

CT suggested f40 write to the new Secretary of State for Education, Nadhim Zahawi, about the SEND review.

EP said she agreed and said f40 needed to take firm action. She said we have had Covid but it was time f40 put its points forward in a positive way.

CT said she was concerned about the Comprehensive Spending Review at the end of October, so f40 needed to speak up now and make the point that education could not take a financial hit.

JMcl agreed. He said f40 had written to the new Education Minister, as well as Schools Minister Robin Walker, who was a former Vice Chair of f40, to congratulate them on their new posts and to invite them to meet with the group and discuss issues further. He said f40 would write a second letter, setting out some of the key issues.

Action: KW to write to both the Education Minister and Schools Minister to set out f40's key issues with education funding and urging that the SEND review be published as soon as possible.

Action: KW to write a summary of the FMRT meeting and to arrange a second meeting with JS and members of the FMRT so the detail of the survey could be agreed and responsibilities shared out.

8. Covid impact on education

EP said the current issue was that the Recovery Premium Grant announced in July was only based on those pupils who qualified for Pupil Premium. She said those schools with few children in receipt of Pupil Premium would receive very little. She also said there was lots of conflicting messages around, so parents were under the impression additional funding had been allocated for one thing, but schools may need to spend it in a different way. She said she would like more clarity on how it could be used.

SP said the Covid Recovery Grant had not made any allowances for Early Years, which was a serious issue. She said Early Years was where educators had the greatest leverage in the impact they could have on children, and f40 should perhaps also be focusing on this issue in its letter to the Minister.

JH agreed that the Covid Recovery Grant conditions were very strict.

Action: KW to produce a short letter/briefing note for the new ministers on f40 priorities.

9. Update on f40 conference

KW said due to rising Covid cases, it would not be possible to organise an in-person f40 conference this year, as hoped.

She said f40 would be organising a series of Q&A webinars instead and more details would be released in due course. The first speaker had already been lined up, but dates were still to be confirmed.

Action: KW to plan first webinar with members of the Executive and to circulate details to members.

10. F40 workshop on priorities

JMcl suggested an online workshop be held for members of the Executive Committee to enable them to discuss campaign priorities and for new members to get to know the group.

It was agreed that the workshop should be held in October.

Action: KW to circulate a doodle poll and arrange.

[Post meeting note: The workshop will be held on Monday, October 18, from noon until 2pm]

11. Update on MP's briefing in Westminster

KW said it was still hoped that the MPs' briefing could go ahead on November 9 in Westminster. However, KW said she was awaiting the latest Covid guidance on numbers permitted to attend.

KW said Conservative Vice Chair Gary Streeter had agreed to sponsor the event and his office had secured a room.

[Post meeting note: KW has since been informed that under the current Covid guidelines nobody from f40 would be permitted to attend the briefing in the House of Commons as it would not be considered 'essential business'. The rules may change in mid-October, but the event could not be confirmed until after that time. The decision has, therefore, been taken to postpone the briefing until early in 2022]

Action: KW to inform f40 members of the latest position and to make necessary arrangements.

12. Financial Update / Membership invoicing 2021

KW updated members on the invoicing of annual subscriptions. She said the majority of local authorities had now paid their subscriptions for 2021, with the remaining in hand. She said f40 had a healthy bank balance.

13. Annual subscriptions

JMcl said in April 2022, subscriptions may need to increase as they had been at the lower rate of £500 per year for the past four years. He suggested fees increase to £750 per year.

MJ said originally fees had been £2,000 per year, and then £1,000 per year, before being lowered to £500 on a temporary basis in 2017. However, during 2020, they had been further discounted to £250 to assist local authorities through the turbulent months of the pandemic.

However, she said if f40 wanted to hold a conference it would not be sustainable at the £500 rate.

JS said she would not object to a rise to £750.

JMcl proposed that annual subscriptions rise to £750 a year in April 2022, which was seconded by MJ. The motion was passed.

14. Any other business

There was no other business.

15. Date of next meeting.

KW said the next meeting was due to be held in December. Due to rising cases of Covid, it was agreed that the next meeting would be held remotely again, hopefully, with some meetings being held in person during 2022.

Action: KW to circulate a doodle poll to agree the next meeting date in December.

[Post meeting note: The next Executive Committee meeting will be held on Tuesday, December 7 from 10am until 11.30am]

16. Retendering of Secretariat role

Draft contract documentation from Derbyshire regarding the requirements of the secretariat role was discussed to seek views from the Executive. It was agreed that the draft requirements reflected the need. Some further discussion was held regarding next steps of the procurement process. JMcl agreed to keep Executive Committee updated regarding the progress.