



Wirral Schools Forum

Date:	Tuesday, 23 January 2024
Time:	5.00 p.m.
Venue:	Ganneys Meadows Nursery School, CH49 8HB

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AGENDA

1. **WELCOME AND APOLOGIES**
2. **MINUTES OF THE MEETING HELD ON 21 NOVEMBER 2023 (Pages 1 - 8)**
3. **MATTERS ARISING**
4. **SENSORY SERVICE UPDATE (Pages 9 - 12)**
5. **ENERGY PRICE UPDATE REPORT JANUARY 2024 (Pages 13 - 16)**
6. **SCHOOLS FORUM SCHOOL BALANCES AND PROJECTIONS JANUARY 2024 (Pages 17 - 20)**
7. **BUDGET MONITORING 2023-24 QUARTER 3 (Pages 21 - 26)**
8. **SCHOOLS BUDGET 2024-25 (Pages 27 - 40)**
9. **NOTIONAL SEN BUDGET 2024-25 (Pages 41 - 42)**
10. **DE-DELEGATION OF SCHOOL BUDGETS (Pages 43 - 54)**

11. **SCHOOLS FORUM MEMBERSHIP JANUARY 2024 (Pages 55 - 58)**
12. **SCHOOLS FORUM WORK PLAN JANUARY 2024 (Pages 59 - 60)**
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WIRRAL SCHOOLS FORUM

Tuesday, 21 November 2023

<u>Present:</u>	Member	Whitely (Chair)	
	Members	K Kennedy C Mervyn S Davies M Loftus J Proctor S Allen P Waring	L Prescott K Ball H Barker E Ball L Jones M Farrelly M Jackson E McGunigall (for S Ralph)

40 WELCOME AND APOLOGIES

The Chair welcomed everyone to the meeting and noted that he intended to move Item 9, Schools Admissions Update to the to go first and everything else to follow in the order already laid out in the agenda, Members were happy with this amendment to the running order.

Apologies had been received from:

- Sue Ralph - Primary Headteacher (substituted by Elaine McGunigall).
- Julie Merry - Primary Governor.
- John McDonald - Primary Headteacher.
- Nicky Prance - Non-Schools Group.
- Sue Powell-Wilde – Councillor.
- Kathy Hodson – Councillor.
- Chris Cooke – Councillor.

41 MINUTES OF THE MEETING HELD ON 26 SEPTEMBER 2023

It was noted that Kate Ball – Primary Headteacher, had attended the meeting of 26 September 2023.

It was noted that recommendation 2b. of Minute 32 should read Church Drive and not Church Road.

With those amendments, it was:

Resolved – That the minutes be approved as an accurate record.

42 **EDSENTIAL UPDATE**

Ian McGrady, Managing Director of Edsential, presented a report which summarised how Edsential was fulfilling its mission as a Community Interest Company, in partnership with schools over the past year. He gave rundown of the increased demand, and provision of the Holiday Activity and Food programme, with an additional 1523 children taking part in the programme in Summer 2023 compared to Winter 2022.

The report also showcased some service delivery highlights which included a programme that allowed young musicians to take part in the first live performances and the Edsential Conway Centre winning the Best Residential Experience 2023 at the School Travel Awards.

The report noted the difficulties that inflation had caused for Edsential in terms of the cost of food, staff, energy and transport and stated that despite the challenges faced, the company intended to try and keep any price increases as low as possible.

Members of the Forum queried if places for the Holiday Activity and Food programme had been commissioned for the following year and were informed that places were booked up until Christmas 2023, with applications able to be made for Spring 2024 after this.

Members discussed how they could support the programme and whether food costs per meal would be available to schools earlier than they were the previous year. They were informed that Edsential would provide any information on its services if required and assured Members that food costs would available sooner than last year, with the aim to share those costs with schools and the Forum by January 2024.

Resolved – That the report be noted.

43 **DE-DELEGATED BUDGET FOR SCHOOL IMPROVEMENT SUPPORT AND BEHAVIOUR SUPPORT UPDATE**

James Backhouse, Assistant Director, Education, presented a report which gave an update on the services delivered from the Behaviour Support and School Improvement functions funded by de-delegated school budgets. The report noted the local authority's responsibility to have regard to the Schools Causing Concern statutory guidance and stated that the school improvement strategy for Wirral schools was fully embedded and further development was under way.

Members of the Forum requested an impact report at a future Forum meeting showing actions taken and the results of those actions. James Backhouse agreed that a feedback report would be brought to the Forum in due course.

Resolved –

1. That the developments in relation to the strategic use of de-delegated budgets to support school improvement and behaviour support be noted; and

2. That a further update in relation to de-delegated budgets be received by the Schools Forum in six months' time.

44 **DE-DELEGATED BUDGETS - CONTINGENCY, SPECIAL STAFF, AND INSURANCE COSTS**

Asako Brown, Senior Finance Business Partner, presented a report which summarised the current provision for contingency, special staff, and insurance costs that are funded by de-delegated budget from Wirral's maintained primary and secondary schools.

Members of the Forum discussed shared parental maternity leave and were informed that it was covered within the Special Staff Costs within the report. James Backhouse noted that he would seek clarity from Human Resources on the specifics of the scheme.

Members queried where funds would go if budgets were not spent at the end of the financial year and was informed that the money was part of the Delegated Schools Grant Funding and so was not ringfenced in any way.

Resolved – That the report be noted.

45 **DE-DELEGATED BUDGETS - LIBRARY SERVICE**

James Backhouse, Assistant Director Education, presented a report that gave an update on the recent changes to the Schools' Library Service and the service plans for the future. The report noted that the Schools Library Service was a de-delegated service, mainly for Primary Schools, although other schools can access services on request. Academies had the opportunity to buy back into the service. The report gave further budget information, summarised the 2023-24 service priorities and gave staffing details. It was noted that 2024 would mark 50 years of Wirral Schools Library Service.

Members of the Forum requested that their thanks should be passed to Louise Rice and Catherine McNally of the Wirral School's Service and that some form of celebration should be made to mark the 50th anniversary of the service.

Resolved – That the report be noted.

46 **NATIONAL FUNDING FORMULA 2024-25 FUNDING UPDATE (DSG)**

Asako Brown, Senior Finance Business Partner, presented a report that provided the Forum with an update of the 2024-25 Schools Block funding following the government announcement of the changes in the DSG National Funding Formula in October 2023. The report sought the view of Members on how any spare capacity within the funding available should be allocated following the feedback from the consultation with schools on the 2024-25 funding. The outcome of the consultation and the decision of the Schools Forum would then be considered in the budget recommendations presented to the February 2024 meeting of the Policy and Resources Committee.

Members discussed their concerns at the lack of clarity of information, noting that planning services and providing details of staffing and placements was difficult when schools did not know the level of funding they would receive. Officers shared the frustration and stated that they would share any information they received from the Department for Education regarding funding as soon as they received it.

Resolved –

- 1. That the report be noted.**
- 2. That the proposal to include +0.5% Minimum Funding Guarantee within Wirral formula in 2024-25 be agreed (10:0 – 1 abstention).**
- 3. That the proposal to a falling rolls/growth fund from any spare capacity within the 2024-25 school allocation be agreed (9:1 – 1 Abstention).**

47 **SCHOOLS ADMISSIONS UPDATE**

Sally Gibbs, PO School Admissions Place and Plan, presented a report providing a brief outline of Mainstream Admissions during the 2021-2022 admission year. The report noted that over 3,300 applications for primary school (Foundation 2) and 3,600 applications for secondary school (Year 7) were received for September 2022.

Members of the forum discussed the potential of increased costs and where the additional funding would come from, officers noted that the admissions budget would come from Central Support Funding and that there was an expected uplift into 2024-25 which would cover the increased costs.

Members queried whether a geographical analysis had taken place and what support was available to help parents apply for a school. Officers noted that geographical analysis had been undertaken in the past and it showed that the areas with the highest levels of deprivation had the highest frequency of non-

application for children that still required a place at a school. The School Portal system shows who has applied and lists of children that have a nursery place but have not made an application for a primary school can be shared with the nurseries/schools and officers will call the schools a few days before the application deadline to make them aware that no applications have been received for specific children.

Resolved – That the report be noted.

48 **NEW BUDGET MONITORING SYSTEM FOR SCHOOLS**

Asako Brown, Senior Finance Business Partner, presented a report that set out the requirements under the Scheme for Financing Schools, to provide budget setting, budget monitoring and 3-year projections throughout the financial year. Headteachers had requested, through Wirral Schools Forum, to consider alternatives to the current process for budget monitoring to allow more control, particularly when considering the effects of staffing changes on budget projections.

The report noted that a business case for a new budget monitoring system for schools had been presented to the Change Advisory Board on 15th November 2023 with the aim for implementation of the new system by 1st April 2024.

Resolved – That the report be noted.

49 **HIGH NEEDS WORKING GROUP - VERBAL UPDATE**

James Backhouse, Assistant Director Education, gave a verbal update on the High Needs Working Group.

50 **CLAWBACK CONSULTATION UPDATE**

James Backhouse, Assistant Director Education, presented a report outlining the feedback to schools' forum in relation to the surplus clawback consultation that was conducted from 28th September 2023 until 9th November 2023 in relation to a clawback mechanism for Wirral Maintained Schools.

The report noted that on 26th September 2023, the Wirral Schools Forum approved that the consultation should take place to capture feedback in relation to the questions that were outlined in the report, it was outlined that the schools balances position for Wirral maintained schools was still historically high in comparison to pre-covid levels and that some schools on Wirral had significantly high revenue budgets. Following the approval at schools' forum the consultation questions were circulated, and the report gave an overview of the responses. The consultation had received 13 responses from Wirral Schools.

It was noted that many other local authorities do have a clawback mechanism in place to address excessive balances where they occur. An excessive balance would be one that is higher than the Department of Education (DfE) good practice guidance. Wirral currently does not have a mechanism in place. DfE guidelines states it is good practice for primary, nursery and special schools to have a balance reserve of 8%, for secondary schools this would be 5%.

It was noted that only members of the Forum from maintained and special schools were eligible to vote on the recommendations in this report.

Resolved –

- 1. That the commencement of a clawback mechanism for Wirral Maintained Schools be agreed (6:2)**
- 2. That the time period that the clawback will be calculated over 3 years. (Note the options were: A. 4 years, B. 3 Years or C. 2 years. Votes were as follows: A=1 / B=4 / C=3)**
- 3. That the relevant forum members agreed to meet again regarding schools identified for the clawback mechanism.**

51 **WIRRAL SCHOOLS FORUM MEMBERSHIP**

James Backhouse, Assistant Director Education, presented a report describing the current representation of the Forum and membership changes. The report noted that there were 5 vacancies and 2 representatives whose term of office was due to end at the end of 2023.

James Backhouse noted that no nominations had been received for the 16-19 sector vacancy and would appreciate a nomination as soon as possible.

The Chair noted there was need to look at the maintained sector for representatives.

Resolved –

- 1. That the report be noted.**
- 2. That it be noted that as schools continue to convert to academies, the membership split between primary, secondary and academy will need to be monitored closely.**

52 **WORKPLAN**

James Backhouse, Assistant Director Education, noted that he would like to book an additional meeting of the Forum in March 2024 and would look for a suitable Tuesday then.

Resolved – That the Work Plan be noted.

53 **ANY OTHER BUSINESS**

The Chair requested that the next meeting of the Forum be held at an alternative location as the he felt that the Assembly Room in Birkenhead Town Hall was not suitable.

Kathryn Kennedy, Head Teacher of Ganneys Meadow Nursery School, volunteered the use of her school for the next meeting.

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WIRRAL COUNCIL

SCHOOLS FORUM – 16th January 2024

REPORT OF THE DIRECTOR FOR CHILDREN, FAMILIES AND EDUCATION

SENSORY SERVICE

1. EXECUTIVE SUMMARY

1.1 The purpose of this report is to update Schools Forum on the Sensory Service

1.2 Children and young people on active caseloads for the Sensory Service

Hearing Impairment caseload	Vision Impairment caseload
306	240

There are 16 children with multi-sensory impairment who are seen by the Vision and Hearing Support Teams.

Total pupils = 530 (306+240-16)

(figures from November 2023)

Does not include new referrals under assessment

2. BACKGROUND

2.1 Wirral has 530 children and young people with a significant vision/hearing impairment (0-19 years) who access the Sensory Service. They are all assessed using the National Eligibility Criteria for intervention and must have a clinically diagnosed impairment. This Criteria can be found on the SEND Local Offer. The aim of the Service is to deliver early intervention from birth and then to support pupils more heavily in KS1 and 2. This is to develop independence skills in KS3 and 4 in preparation for adulthood.

2.2 Out of local authority area provision (OLA) – 4 pupils

(i) New referral from a Wirral family who have recently adopted an OLA child who presently attends the Royal School for the Blind (year 7)

(ii) Another pupil is placed at the Royal School for the Blind in Liverpool (year 14).

(iii) Another pupil is placed at St Vincent's School for the Blind in Liverpool (year

9).

(iv) One pupil who has a hearing impairment and communicates only through British Sign Language is attending secondary provision at the Royal School for the Deaf in Derby (year 11)

It is projected that there will be 3 OLA pupils in September 2024

Targeted interventions

2.3 There are 54 children who receive targeted interventions involving a combination of Teacher, Specialist Teaching Assistant and Habilitation Officer. These interventions range from full time support for those using braille or sign language to access the curriculum. There is also a variety of specialist support which may include direct teaching of specialist skills, training for school staff, adaptation and curriculum access and the provision of extra curricular activities.

Monitored pupils receive assessments, reports and advice in line with the Eligibility Framework.

Deaf Resourced Provision (RP)

3.0 There is no longer a RP at Townfield Academy school. The Service reviewed need on the Wirral and as a consequence schools were asked for expressions of interest in the summer term of 2023, six schools showed an interest. Greenleas Primary school was successful, and two children started at the new RP in September 2023. Early Years data projects that the numbers at the RP will continue to grow to seven or eight children in the next 4 years. The intention is also to develop a Key Stage 1 assessment procedure which would expect to add one or two children a year to the RP. Having recently received a cochlear implant they would typically require high levels of intervention before they could return successfully to their original school where they would remain on role.

3.1 All of the staffing for the RP will be provided by the Sensory Service. Place funding of 6k will be allocated to the Service budget every year (at present 4 x 6k). Additional staffing cost will be provided through the EHCP mechanism.

4.0 Funding for the Sensory Service has not risen in line with pay rises and pension rises in the last eight years and for the first time has created a shortfall in the staffing budget in 2023-24. It has been agreed to review the 2024-25 budget to address the shortfall.

5.1 Staffing comparison since 2015

	2015	2020	2023
Teacher of the Deaf	4.8	4.8	4.6
Teacher of the V.I.	4.0	4.0	4.0
Specialist TA HI	5.5	4.2	4.3
Specialist TA VI	6.1	5.5	6.1

Habilitation Officer	1.0	1.0	1.0
Manager	1.0	1.0	1.0
Total	22.4	19.9	21.0

All figures are total full-time equivalents.

5.2 Resourced Provision staffing

Additional staffing required for the RP and presently in place.

	2015*	2020*	2023 Greenleas
Teacher of the Deaf	1.0	1.0	0
Specialist TA H.I.	5.0	4.0	1.0

All figures are total full-time equivalents.

* Previous RP school

5.3 Additional Specialist funded or part funded by the Sensory Service

(i) One specialist TA on a temporary contact has joined the Hearing Support Team to help staff the RP.

(ii) One specialist TA on a temporary contract has joined the Vision Support Team to help with high support needs. This is partially offset with a 0.5 TA vacancy.

(iii) additional staff

	2015	2020	2023
Deaf Tutor for British Sign Language Tuition (iv)	0.6	0.6	0.6
Highly Specialised SaLT for Deaf (v)	0.8	0.8	0.8

(iv) The Deaf Tutor provides direct sign language training from a deaf person to pupils in settings and British Sign Language accredited courses for families and settings staff.

(v) SaLT is joint funded by Health (0.6fte) and the Sensory Service (0.2fte).

5.5 Specialist Teacher ratio comparisons

Wirral HI pupils (October 2023) 306, 4.6 ToDs = 67:1

Cride survey 2022/23, for England,

“each visiting ToD had a theoretical average caseload of 64 deaf children”

Wirra VI pupils (October 2023) 240, 4 QTVIs = 60:1

Northwest Heads of Service Benchmarking data (October 2023), Average 65:1

6.0 Referral Data

Vision Support Team

	2023-2024*	2022-2023	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018
Year Total	19	42	40	34	24	33	56

Hearing Support Team

	2023-2024*	2022-2023	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018
Year Total	27	29	36	15	35	49	79

* only the autumn term 2023

- 6.1 As is typical with low incidence data, there is a large variance in numbers. The numbers also do not indicate severity of need. The impact of the Covid years can be detected with lower numbers from 2019 to 2021. The Service responds within 2 working days to new referrals. This is a strength of the Service which has been commented on by schools and parents.
- 7.0 The Service has relocated and is now working out of Claremount Specialist Sports College.

8.0 RECOMMENDATIONS

1. That the Forum notes the report

Peter Davies, Head of Sensory Service

WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM – 16 JANUARY 2024

ENERGY PURCHASING FOR SCHOOLS UPDATE

1. EXECUTIVE SUMMARY

This paper provides a brief update on the procurement of electricity and natural gas on behalf of schools and suggests budget changes for the 2024/25 financial year. The extreme market volatility of the past two years has reduced and we are seeing a reduction in prices but the future remains unpredictable.

2. PURPOSE OF THIS UPDATE

The purpose of this report is to provide schools with information on:

- Energy Market Performance
- Department for Education purchasing recommendations.
- Unit prices for natural gas and electricity that are anticipated for the 2024/25 financial year based on December 2023 data.
- Uncertainties in projecting future costs.
- Budget change suggestions to ensure provision for the purchase of electricity and natural gas over the 2024/25 financial year.
- Support for energy efficiency from the Department for Education and the Council
- Environment and climate emergency

The content of this report is only applicable to accounts that are part of the Crown Commercial Service (CCS) framework agreement. The Council holds no information for schools which make their own energy supply arrangements and cannot comment on their arrangements.

The information provided is based on market intelligence covering half of the contracted purchasing period which runs from 1 October 2023 to 31 March 2024. Observations on future prices should therefore be interpreted as indicative.

3. ENERGY MARKETS

The energy markets have calmed over the past year and the extreme volatility has reduced. Although there is currently more stability in the markets this could be undermined by unforeseen events.

Gas and Electricity prices lifted for a short while at the end of November when significantly colder than normal temperatures and low wind pushed up demand from both consumers and power stations.

Since November prices have moved lower as the market increasingly discounted geopolitical risks and focussed more on the comfortable looking balance of supply and demand. Contract prices for delivery in the next financial year (April 24 onwards) have dropped.

Geopolitical concerns have increasingly taken a back seat over the past month. Markets have set aside concerns that the Israel/Hamas war might spill over into a wider regional conflict which could in turn disrupt the seaborne transit of gas. The

impact of recently reported disruption to shipping in the Red Sea emanating from the Yemen will have on prices is not apparent at the time of writing.

Gas demand remains significantly below pre-crisis levels, with lower industrial, residential, commercial, and power station demand contributing to UK demand remaining a good 15% below normal.

On the supply side, Norwegian production has lifted to virtually full capacity and deliveries of Liquefied Natural Gas (LNG) into the UK and Europe have been rising. Panama has seen exceptionally dry weather over the past year resulting in falling water levels in the Panama Canal and restrictions on transits via the canal. With US LNG projects located on the east coast, this is keeping more US LNG in Europe, rather than taking the long way to Asia. With restrictions on the canal due to deepen into the New Year, this trend is only likely to intensify.

Power prices have been tracking gas lower but the improved balance in Europe, due to the return of French nuclear units and higher European hydro levels, plus falling UK carbon prices have seen price drops in some contracts outpace those in gas. Electrical interconnection between the UK and Europe has been strengthened which is expected to further stabilise the international network.

4. DfE PURCHASING RECOMMENDATIONS

For the supply of energy and ancillary services the DfE recommend Crown Commercial Service (CCS) as a potential framework supplier <https://find-dfe-approved-framework.service.gov.uk/list/energy-ancillary> . The framework arrangement accessed via Wirral Council is a CCS product RM6251 'Supply of energy 2'.

5. ANTICIPATED 2024/25 UNIT PRICES BASED ON DECEMBER 2023 DATA

In line with the framework arrangement natural gas and electricity are being purchased on our behalf by CCS over a six-month window running from 1 October 2023 to 31 March 2024. The information provided is based on that currently available and may be subject to change.

The CCS risk managed approach continues to deliver competitive average unit costs: The Crown Commercial Service purchasing update for December 2023 suggests the following unit prices will apply assuming conditions do not change.

- Electricity: 24.233 p/kWh (Standing Charges and Climate Change Levy included)
- Natural Gas: 5.485 p/kWh (Standing Charges and Climate Change Levy included)

Indicative commercial energy unit rates reported on the U-switch website on 19 December 2023 suggested the following unit prices for a large user:

- Electricity: 29.0 p/kWh (Standing Charges and Climate Change Levy excluded)
- Natural Gas: 11.2 p/kWh (Standing Charges and Climate Change Levy excluded)

It should be noted that non-energy costs made up over 66% of electricity costs and approximately 25% of a typical gas bill. Many of these costs are agreed by the

regulator OFGEM with the suppliers. Customers have no influence over these costs which are often updated in the first three months of the calendar year. It cannot be guaranteed that these cost elements remain stable.

6. UNCERTAINTIES IN PROJECTING FUTURE COSTS

The magnitude and frequency of market fluctuations over the past three years has led to CCS adopting modified purchasing protocols that were agreed with the Treasury. Previously if market prices reached a certain level above the previous year with little prospect of reducing this would prompt CCS to fill all baskets at the earliest opportunity. The volume traded was sufficient to further inflate prices so it has been decided that CCS will fulfil its six-monthly purchasing requirements in six equal tranches.

Energy markets may be affected by a multiplicity of factors that show as increased or decreased prices. The UK is a net importer of energy and our prices are set on international markets. Events across the globe can have a significant impact.

Factors that are expected to affect energy market prices include:

Weather: The weather is an obvious factor that affects both gas and electricity prices. Gas is used to generate electricity so short-term prices are interlinked. The impact of an extended period of cold weather has the potential to push up prices because of increased demand. Similarly milder weather may reduce market prices.

Reduced Demand: Over the past two years of high prices demand for energy has reduced as users have taken steps to reduce their outgoings. Conventional economic theory suggests a lower demand will help to control price rises. Electricity and global gas supply and demand seems relatively well balanced at the time of writing and this will help maintain stability.

Geopolitics: Geopolitical issues may have an impact. The Israeli/Hamas war has had little lasting impact on international energy markets to date, but this may change. The disruption to shipping through the Suez Canal may have an impact on delivery times and costs. Increased demand for LNG from the Far East has the potential to push up prices. Russian gas is still being supplied to Europe and the impact of EC policies is uncertain. The war in Ukraine also has the potential to affect energy markets.

7. CHANGES IN PROVISION FOR GAS & ELECTRICITY EXPENDITURE

The following changes to expenditure are suggested as precautionary provisions to take account of the reduced prices anticipated for 2024/25. The suggestions are made using the most recent information available.

- Reduce provision for **natural gas** supplied by TGP by 34.52%
- Reduce provision for **electricity** supplied by EdF by 32.61%

8. ENERGY EFFICIENCY SUPPORT FROM THE DfE AND WIRRAL COUNCIL

The Department for Education has published extensive targeted advice on improving energy efficiency in schools on their website:

<https://www.gov.uk/government/publications/energy-efficiency-guidance-for-the-school-and-fe-college-estate/energy-efficiency-guidance-for-the-school-and-further-education-college-estate>

The Council is currently developing emissions reporting for schools to aid investment decisions. The reporting will follow the academic reporting year rather than the financial year. The reporting will adhere to guidance on Greenhouse Gas Reporting and use the conversion factors that are updated annually.

8. ENVIRONMENT AND CLIMATE EMERGENCY

In July 2019 Wirral Council declared an Environment and Climate Emergency. Following the declaration, the Council is seeking to reach net zero carbon emissions by 2030 as its locally determined contribution to the Borough's target of achieving net zero before 2041. The Council will be purchasing electricity from renewable sources for the 2024/25 financial year under the framework agreement to decarbonise our electricity use. The green electricity is backed by REGO (Renewable Energy Guarantees of Origin) scheme.

9. RECOMMENDATIONS

It is recommended that the Forum notes the content of this report.

WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM 16th January 2024 REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

School Balances and Indicative Deficit Balances

1. EXECUTIVE SUMMARY

This report is a regular report presented to Schools Forum describing the current and projected financial position for schools together with action that is being taken. The position remains challenging due to increased costs during 2023-24, even with additional funding provided for 2023-24 financial year.

2. BACKGROUND

There are ongoing cost pressures in schools arising from pay awards, utilities, other inflationary pressures, changes in pupil numbers and the continuing effects of COVID. There has been additional funding through the Mainstream Additional Grant (MSAG) Grant for 2023-24, which will be added to the formula budget for 2024-25 (Additional funding for Special schools) and Teachers Pay Additional Grant (TPAG) from September 2023 to cover the additional cost of Teachers Pay awards. There will be further increases in DSG for 2024-25 financial year but at a much lower rate than 2023-24.

3. Indicative Balances

The final cumulative school balances as at 31st March 2023 were £13.5m, which was a reduction from the previous year of £2.5m after the 2021-22 balance was adjusted for 3 academy conversion during 2022-23.

The table below summarises the estimated balance position after period 6 monitoring, which indicates that balances may reduce by £6.53m in March 2024 with a further reduction of £9.8m in March 2025. If no action is taken school balances will be in a negative position at this time

The 2022-23 outturn has been adjusted for schools that have converted to academy during the 2023-24 financial year, so that the balances can be compared like for like.

Table 1

School Phase	Actual Balances at Mar 2023 £	Expected Balances at Mar 2024 £	Expected balances at Mar 2025 £
Nursery	132,411	-196,452	-460,293
Primary	9,595,668	6,040,100	436,941
Secondary	2,123,946	1,817,810	792,939
Special	1,008,493	-1,328,802	-4,239,807
Total	12,860,518	6,332,656	-3,470,221
Academy Conversions (9)	656,219		
Total	13,516,737		

However, this position tends to be more pessimistic, or cautious, than the final outturn due to higher than expected income received towards the end of the year along with closer monitoring of spend by the school if the budget is moving towards a deficit position.

4. Individual School Deficits

There are currently 9 schools with licenced deficits and agreed budget plans or working with the LA to put one in place. In addition, there are 7 schools who will be issued with a Notice of Concern.

On the basis of table 1 the number of schools who may have a deficit budget as at March 2025 would increase to 57 (24 in March 2023), each school with an average deficit of £74k.

Table 2 – expected deficits in March 2025 if no action is taken

	Number of schools	Expected number of schools with a deficit	% schools with a deficit
Nursery	3	2	67%
Primary	65	36	55%
Secondary	4	2	50%
Special	11	7	64%
	83	47	57%

The deficit position is now increasing for all phases but remains particularly difficult for Special Schools. Those schools with small credit carry forward balances March 24 are most likely moving into a deficit by March 2025. As stated earlier figures at period are more cautious, so although an increase in deficit budgets is likely, some schools will be able to make savings to stay in credit.

5. Action Taken to Date

- Licenced deficit plan is in the process of being agreed for 2 schools that cannot set a balanced budget in 2023-24, with the other schools still working through already agreed plans.
- The Notice of Concern process is currently being reviewed and it is expected that 7 will be managed within this process.
- LMS and HR continue to work with schools to balance budgets and plan any reduction in staff numbers or hours. Where schools are reviewing staffing levels this is in a number of cases leading to a consideration of redundancies.
- There are continued discussions with Headteachers and school finance staff where budgets are not balancing in future years.
- School Bursars continue to support Headteachers and governors with more detailed projections.

6. Future Action

- To review the position of school balances after Period 6 monitoring, taking account of additional staffing costs already detailed and identify schools who will move into a deficit position.
- Contact schools with large projected deficits in future years to discuss ways to reduce in year deficits going forward.
- Schools requesting a licenced deficit are required to demonstrate how the budget will come back into balance within 3 years (4 years in exceptional circumstances).
- Where agreement cannot be reached a Notice of Concern will be issued, requiring an immediate action plan to be agreed by governors.

RECOMMENDATIONS

1. That Forum notes the report
2. That school budgets continue to be monitored.

Simone White
Director of Children, Families and Education

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WIRRAL COUNCIL

SCHOOLS FORUM – 16th JANUAR 2024

REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

SCHOOLS BUDGET VARIATIONS 2023-24

1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to provide an overview of the anticipated variations for the current year 2023-24 schools budget.

2.0 2023-24 SCHOOLS BUDGET

2.1 Overall the schools budget is forecast to overspend by £5.214m which is mainly due to pressure in the High Needs Block. This reflects an increase in the overspend of £4.978m from the position reported at the September 2023 meeting. The table below summaries the outturn position by funding block and a more detailed analysis is attached in Appendix 1.

	2023-24 Budget £	2023-24 Forecast £	2023-24 Variation -Under/Over spend £
Schools Block	119,784,792	119,767,118	-17,674
Schools Block de-delegated	2,081,084	2,079,426	-1,658
Central School Services Block	4,647,334	4,632,028	-15,306
High Needs	58,574,600	63,394,304	4,819,704
Early Years	21,880,382	21,880,382	-0
DSG Grant Income	-204,165,353	-203,949,623	215,730
Total before contribution to/-from Reserve	2,802,839	7,803,635	5,000,796
Movement on DSG Reserve	-213,286	-5,214,082	-5,000,796
Total after contribution to/-from Reserve	2,589,553	2,589,553	0

Cumulative reserve balance b/fwd from 2022-23	-4,762,638
In-year contribution to/-use of reserve	-5,214,082
Cumulative reserve balance c/fwd to 2024-25	-9,976,720

2.2 The 2022-23 financial year closed with a Dedicated Schools Grant (DSG) reserve cumulative deficit position of £4.763m. The current forecast outturn position means that the year-end addition to reserve balance will be increased to £5.214m thus delivering a cumulative £9.977m deficit position at the end of 2023-24.

3.0 2023-24 BUDGET

3.1 The schools block and the de-delegated budget have been adjusted to reflect the changes due to 3 schools academy conversions in May and October 2023. The DSG Grant Income has been reduced by the corresponding amount.

4.0 2023-24 FORECAST BUDGET VARIATIONS

The budget variations that make up the £5.224m overspend are identified in the table attached Appendix 1. The reasons for the variations as well as comments on specific budget areas are given below.

4.1 Schools Block £18K favourable

As agreed by the Forum at September 23 meeting, the 2023-24 Falling Rolls and Growth Fund to be carried forward to 2024-25. The underspend will be included in the DSG reserve to be utilised in 2024-25.

4.2 Special Schools £478K adverse

The budget includes additional places to address demand, and as reported at Sep 23 meeting, the anticipated increase in number of places will exceed the budget set aside for 2023-24. The forecast reflects the allocation of additional 110 places from September 2023 which are mainly for the expansion of the Clare Mount, Foxfield and Observatory schools. The final number of places to be allocated to the special schools might increase further depending on the demand.

4.3 SEN Bases £19K favourable

A pressure from the base project which has increased by 36 places from September 23 is mitigated by the Observatory school's 6 pilot places included in this budget to be funded from the Special Schools budget as mentioned in 4.2 above. The plan for the further 5 base project places from January 24 has been postponed.

4.4 Sixth Form/Further Education 58K adverse

This is due to an increase in pupil numbers at the Wirral Met College.

4.5 Early Years Balanced

The forecast position assumes that the take-up of 2- and 3–4-year-old provision will be in line with planned activity, including the early years supplementary grant (EYSG). The EYSG was announced in July 23 as a supplementary funding to increase the hourly rate paid to local authorities, so that the amount of funding early years childcare providers receives for delivering the entitlements for the period can be increased.

4.6 Schools Block de-delegated £2k favourable.

A small favorable variance related to the insurance costs which is forecasted to be the same level of as the past years and a pressure from the maternity/paternity pay.

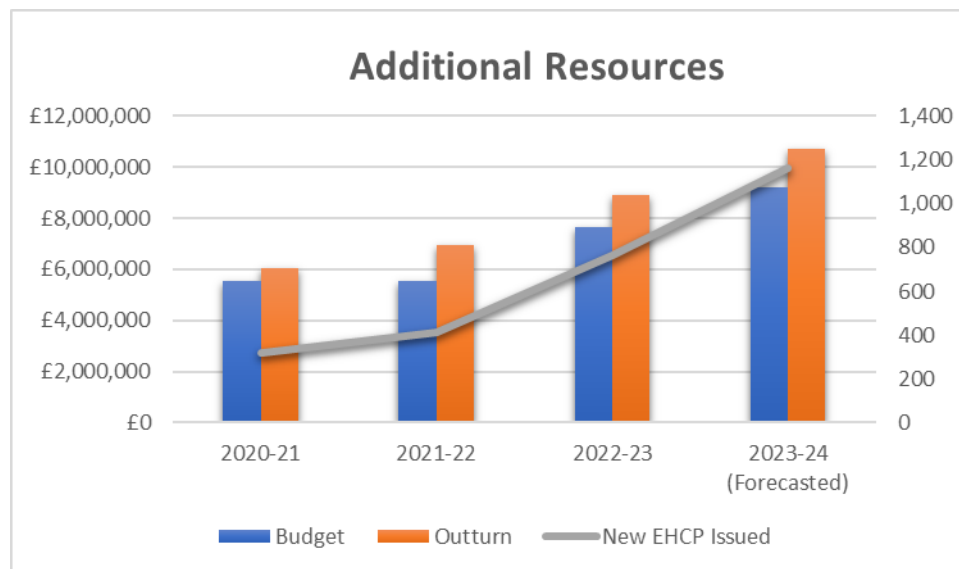
4.7 Central School Costs £15K favourable

- Admissions - £13k adverse variance due to staff pay awards.
- Schools Forum - £11k favourable. There is no formal spend plan for this budget at this time and anticipated fully underspend.
- Contingency - £18k favourable. No potential calls on this contingency have been identified at this time.

4.8 Special Education Needs - Additional resources £1.668m adverse

Demand on this budget keeps growing in line with the requests for Education, Health and Care Plan (EHCP) assessments. Requests increased by around 23 % in the period to December 23 compared to last year. Not all the requests will result in a financial outcome, but it is expected that a significant portion will result in Units of Resource being awarded and it is forecasted to be an overspend of £305k for Primary school pupils and £1,243k for Secondary school pupils. The total number of the EHCP issued in the period between April to December 23 is 933, compared with 609 issued in 2022-23.

The graph is the comparison of the budget, outturn/forecasted outturn, and numbers of the new EHCP issued /forecasted to be issued.



	Budget	Outturn	New EHCP Issued
2020-21	£5,567,200	£6,021,938	318
2021-22	£5,567,200	£6,952,272	414
2022-23	£7,653,857	£8,904,554	763
2023-24 (Forecasted)	£9,187,960	£10,737,049	1,163

Please note the outturn and EHCP number for 2023-24 are forecasted figures.

4.9 Special Education Needs – Top Ups £211k Adverse

The table below analyses the forecast position across the various activities that form the overall Top-Ups budget.

	Budget	Forecast	Variation
	£	£	-Under/Over
			spend
			£
Top-Ups for Maintained Special Schools	10,600,807	10,697,636	96,829
Top-Ups for Resourced Provision	2,197,918	2,167,166	-30,752
Alternative Provision	1,318,200	1,378,271	60,071
FE & 6th Form Top-Ups	2,510,000	2,510,000	0
Additional Nursing Support	160,000	82,908	-77,092
Exceptional Needs	1,398,600	1,560,408	161,808
Total	18,185,525	18,396,389	210,864

The budget is forecasted as an overspend which is from the additional top up funding required for the additional special school places and an additional funding for the alternative provision. Also, the need for the exceptional needs has been increased according to the increase in the number of places in the special schools. This budget has been increased by £1.25m for 2023-24 from the previous year reflecting the increase in demand. The position will be monitored closely, and the forecast position re-assessed accordingly.

4.10 Independent Special Schools £2.174m adverse

The demand continues to increase more than anticipated and this budget is forecasted to be an overspend despite the budget has been increased in 23-24.

4.11 Support for SEN £181k adverse

There are several activities and services that are delivered by this budget including Hearing and Vision, Communication Differences, Vulnerable Children, Pre School-Portage and Physical/Medical Impairment. The overall 2023-24 budget is expected to be overspend due to the pay awards and the additional commissioned service for specialist support.

4.12 Dedicated Schools Grant £216k adverse

The favorable variance relates to the following adjustments:

- High Needs Recoupment £ 17,500
- High Needs Import Export £210,000
- Early Years 22-23 grant adjustment -£11,700

5.0 RECOMMENDATIONS

5.1 That the Forum notes the report and the forecast financial position of the Schools Budget for 2023-24

Simone White

Director of Children, Families and Education

Appendix 1 - Budget Variations 2023-24

	2023-24 Budget	2023-24 Forecast	2023-24 Variation
Individual Schools Budget			
Primary	95,740,421	95,740,421	0
Secondary	24,026,697	24,026,697	0
Special	14,861,376	15,339,488	478,112
Wirral Hospitals School	1,723,463	1,723,463	0
SEN Bases	1,272,499	1,253,243	-19,256
Sixth Form/Further Education	146,000	204,000	58,000
Early Years	20,858,723	20,858,723	0
Growth and Falling Rolls Fund	17,674	0	-17,674
Individual Schools Budget Total	158,646,853	159,146,035	499,182
Central School Costs			
Early Years Costs	571,659	571,659	-0
Admissions	402,604	415,616	13,012
School Redundancy Costs	74,000	74,000	0
Licenses and subscriptions	286,976	286,976	0
Schools Forum	10,600	0	-10,600
Contingency	17,718	0	-17,718
Contribution to combined budgets	535,883	535,883	0
PFI Affordability Gap	2,589,553	2,589,553	0
Retained duties Central (ex-ESG)	730,000	730,000	0
Costs delegated to/de-delegated from schools			
Library Service	174,693	174,693	0
Insurances	23,677	7,000	-16,677
School Specific contingencies	30,204	30,204	0
Special Staff Costs	758,135	773,154	15,019
Behaviour Support	139,698	139,698	-0
School Improvement	468,754	468,754	0
Retained duties de-delegated (ex-ESG)	485,923	485,923	0
High Needs Pupils			
Additional resources	10,802,569	12,470,613	1,668,044
SEN top-ups	18,185,525	18,396,389	210,864
High Needs contingency	687,205	748,810	61,605
Independent Special Schools	8,795,780	10,969,559	2,173,779
Home Tuition	364,166	371,416	7,250
Support for SEN	2,127,817	2,309,123	181,306
Special School Transport	58,200	58,200	0
Non-delegated school costs Total	48,321,339	52,607,223	4,285,884
Total Costs	206,968,192	211,753,258	4,785,066
Funding			
Dedicated School Grant	-204,165,353	-203,949,623	215,730
Total before Movement in DSG Reserve	2,802,839	7,803,635	5,000,796
Contribution to/-from DSG Reserve	-213,286	-5,214,082	-5,000,796
Grand Total	2,589,553	2,589,553	0

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WIRRAL COUNCIL

SCHOOLS FORUM – 16th JANUARY 2024

REPORT OF THE DIRECTOR FOR CHILDREN, FAMILIES AND EDUCATION

SCHOOLS BUDGET 2024-25

1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to outline the Schools Budget for 2024-25 so that Schools Forum can give their views on the proposals. The report describes the financial changes to be considered by Schools Forum and Policy and Resources Committee. The proposed budget totals £378.55m for Early Years, Maintained Schools, Academies, Colleges, and Providers for the financial year 2024-25.

2.0 BACKGROUND AND KEY ISSUES

2.1 The Schools Funding Allocations were issued by the Department for Education (DfE) on 19th December 2023. The format of the Dedicated Schools Grant (DSG) is unchanged with Local Authority allocations determined by the National Funding Formula (NFF) for Schools, High Needs and Early Years (EY). The main features include:

- School funding increased with every secondary school allocated at least £5,955 per pupil and every primary school allocated at least £4,610 per pupil.
- Local authorities will continue to set a Minimum Funding Guarantee in their local formulae, which for 2024-25 is between 0% and +0.5%.
- Rolling the 2023-24 Mainstream Schools Additional grant (MSAG) into the schools NFF, ensuring that this additional funding forms an on-going part of schools' core budgets.
- The Schools Block continues to be ring-fenced with limited flexibility to transfer up to 0.5% of the schools' block to High Needs with Schools Forum approval.
- High Needs funding increased by £440m, or 4.3% in 2024-25 nationally.
- EY hourly rates paid to local authorities will increase by £0.44 for 2-year old's and £0.23 for 3&4-year old's.
- EY Supplementary Grant is rolled into the 2024-25 hourly rates paid to local authorities.
- The rolling out of the EY Extended Entitlements announced in July 2023, starts from April 24 (working parents of 2-year-olds) and September 24 (working parents of children aged 9 months to 3 years-old)
- Central schools services block (CSSB) funding increased by 2.42% for the ongoing responsibilities that local authorities continue to have for all schools, while funding for historic commitments within this block will

decrease by a further 20% for those local authorities in receipt of this funding.

2.2 Other factors that have influenced the 2024-25 budget include:

- Existing and on-going demand on services.
- The High Needs strategy.

3.0 FINANCIAL IMPLICATIONS

3.1 The budget for 2024-25 is compiled from the base budget for 2023-24, approved by Council on 27th February 2023 and updated with the issues identified in this report. The total 2024-25 projected budget (DSG and council funded) is £378.55m. A detailed analysis of the 2024-25 budget changes is shown in Appendix 1 in addition to a comparison of the 2023-24 and 2024-25 budgets.

Table 1: Budget for 2024-25

	2024-25 Budget £m
Funding	367.635
Expenditure by funding block:	
Schools	262.515
Central Schools Service	4.611
High Needs	74.793
Early Years	36.633
Total expenditure	378.552
Contribution to/-from reserves	10.917

3.2 The contribution to/from reserves reflects the difference between the funding available and planned expenditure. 2024-25 results in a shortfall in funding and this is due to high needs activities where demand and complexity continue to rise.

4.0 FUNDING

Except for the PFI affordability gap of £2.59m, which is funded from Council resources, the schools budget is funded by the DSG.

4.1 Dedicated Schools Grant (DSG)

4.1.1 DSG is made up of 4 block allocations with restrictions on moving funding between the blocks. The allocation for 2024-25 indicates a £29.374m increase which is an overall increase of 8.75%. The budgets presented have not transferred any funding between block allocations.

4.1.2 The table below compares the gross block funding for 2023-24 and 2024-25 and thus includes both maintained schools and academy school activity.

Table 2: Comparison of the gross block funding

DSG Block	2023-24 Gross Funding £m	2024-25 Gross Funding £m	Increase/-Reduction	
			£m	%
Schools	250.662	262.497	11.835	4.72%
Central School Services	2.058	2.022	-0.036	-1.76%
High Needs	60.534	63.894	3.360	5.55%
Early Years	22.418	36.633	14.215	63.41%
Total	335.672	365.046	29.374	8.75%

Please note that 2023-24 Schools block funding figure does not include the Mainstream Schools Additional Grant (£8.476m). From 2024-25, the funding previously distributed through this grant will be allocated through the schools block NFF, i.e. included in the 2024-25 Schools block funding allocation.

4.1.3 The allocations for the Schools and Central Schools Services funding blocks have been updated for changes in pupil numbers. Pupil numbers are those recorded in the October census, and have changed as follows:

Table 3: Changes in pupil numbers

Pupil numbers	Primary schools	Secondary schools	All-through schools	Total
October 2022 census	24,743	18,283	1,064	44,090
October 2023 census	24,258	18,343	1,066	43,667
Increase/-decrease	-485	60	2	-423

4.1.4 Early Years funding is based on the January 2023 census and the DfE estimated hours for working parents of 9 months to 3-year-old, therefore is indicative at this time.

4.1.5 An extra £440 million investment to support pupils with special educational needs and disabilities (SEND) is being allocated to local authorities nationally and used to fund special schools and provide mainstream schools with additional resources to meet the needs of pupils with complex SEND. This funding is allocated through the high needs NFF and included in the 2024-25 budget as per paragraph 3.1 above.

4.2 Additional Grant for 2024-25

4.2.1 In July 2023 the DfE announced the teachers' pay additional grant (TPAG) to support schools with the September 2023 teachers' pay award. £900m funding in 2024-25 is being split between mainstream schools, special schools and alternative provision (AP), early years, and 16 to 19 provision to cover the 2024 to 2025 financial year (April 2024 to March 2025).

4.2.2 The DfE has announced further funding to support with increases to employer contribution rates to the Teachers' Pensions Scheme from April 2024, however details have not been announced at the time of the report writing.

4.2.3 The above two grants will be allocated on top of the NFF 2024 -2025 except the funding for the EY. More details for the funding elements for the EY are in 5.4.3.

4.3 Other Grant Funding

4.3.1 In addition to DSG and the additional grants above, the following grants represent additional funding sources for schools and are not included in the budget.

4.3.2 Pupil Premium provides funding targeted towards deprivation. It has been confirmed that Pupil Premium rates will increase to £1,480 for primary pupils and £1,050 for secondary pupils in 2024-25. (£1,455 and £1035 in 2023-24 respectively)

4.3.3 The Schools Budget includes funding for High Needs students in 6th Forms. All other post 16 funding is through the National Funding Formula for 6th Forms and thus is not included in the budget.

5.0 BUDGET ALLOCATIONS 2024-25

5.1 Schools Block £262.515m

This budget reflects the delegated budgets allocated to both maintained and academy mainstream primary and secondary schools. In November 2019, the Schools Forum supported this block being redistributed to mainstream schools using the formula factor rates used in the NFF, thus this is the basis on which funding will be allocated to individual schools. The budget includes the 2023-24 Growth and Falling Roll fund planned to be carried forward to 2024-25 as agreed at the September Schools Forum meeting.

5.1.1 Academies

Currently there are 15 secondary academies, 25 primary academies and 1 all-through academy schools with 5 further primary schools confirmed to be academised within 6 months. Academies are independent from the local authority and are funded directly from the ESFA, however Regulations require Wirral to continue to calculate their budgets which are then deducted from Wirral's DSG.

5.1.2 Minimum Funding Guarantee (MFG)

For 2024-25 LAs can apply MFG of between 0% and plus 0.5% per pupil to protect schools from large formula changes. Following a consultation with all primary and secondary schools, School Forum in November 2023 supported a plus 0.5% MFG for the 2024-25 mainstream schools funding formula.

5.2 Central School Services Block £4.611m

5.2.1 This block provides funding for LAs to carry out central functions on behalf of pupils in state-funded maintained schools and academies in England. Funding previously allocated to LAs for the Education Services Grant (ESG) retained

duties is included within this block, together with funding for historic commitments.

5.2.2 Funding allocated to Local Authorities for historic commitments, which for Wirral are the contribution to combined budgets and schools retirement costs (school closure), has been reduced by 20% in line with the DfE’s expectation that these costs will unwind over time.

The funding for ongoing responsibilities includes:

- School Licenses
- Admissions
- Schools Forum
- Former ESG retained duties
- Capital Expenditure from Revenue (PFI costs)

The table below identifies the change to the CSSB funding for 2024-25 analysed across the on-going and historic elements.

	On-going responsibilities £m	Historic Commitments £m	Total £m
2023-24 Final Allocation	1.675	0.383	2.058
2024-25 Allocation	1.715	0.307	2.022
Increase/(Reduction)	0.041	0.077	0.036
Increase/(Reduction)	2.42%	(20.00%)	(1.76%)

The treatment of these budgets, which are considered in further detail later in this report, is in accordance with national guidance.

5.3 High Needs Block £74.793m

This budget covers a range of related activities. The allocation of funding to each activity is based on the “place plus” funding system introduced by the DfE in April 2013 and includes:

- Special schools (pre- and post-16), and non-maintained special schools, both of which receive a base level funding of £10,000 per place.
- Resourced Provision (bases) which receive £6,000 per place.
- Place funding in Wirral’s FE provision at Wirral Met College and Birkenhead 6th Form College of £6,000 per place.
- Additional funding over and above that provided for places in the form of “top ups” is provided on a per pupil basis. The top up, or “plus” element of funding, takes account of the agreed assessed needs of pupils and is paid by the “commissioner” responsible; this may be Wirral Children’s Services, a school, or another Local Authority. Wirral’s top up system uses 5 bands to

allocate funding across special schools, resourced bases, and alternative provision. Non-maintained Special Schools also receive a top up.

- The costs of Top Ups for all education and training for post 16 specialist provision for Learners with Learning Difficulties or Disabilities (LLDD) in colleges and private providers.
- The Hospital Schools budget.
- The cost of placements in Independent Special Schools.
- The costs of Education, Health and Care Plans and Independent Pupil Funding Arrangements.

5.4 Early Years Block £36.633m

5.4.1 This Block funds the costs of EY Education for 2, 3 and 4-year-old children in schools, nurseries, and private voluntary and independent providers for both the universal and extended entitlement. It also includes the costs of 9 months to 2-year-old (under 2s) children of working parents from September 2024. Most of this funding is directed through the EY National Funding Formula (EYNFF). This is allocated to Local Authorities based on an hourly rate which, for 2024-25, has increased by £0.44 for 2-year old's, and £0.23 for 3- and 4-year-old's for Wirral.

5.4.2 The funds in 2024-25 includes the first two stages of rolling out of the EY Extended Entitlements announced In July 2023.

- From April 2024 – all working parents of 2-year-olds can access 15 hours per week. (Hourly rates payable to the local authority is the same amount as the exiting 2-year-olds)
- From September 2024 – all working parents of children aged 9 months to 3years-old can access 15 hours per week. (Hourly rates payable to the local authority is £10.75)

5.4.3 In 2023-2024 the funding previously distributed through the teachers' pay and pension grant (TPPG) has been mainstreamed in the 3&4-year-olds funding rate. In 2024 to 2025, the funding being provided in respect of the September 2023 teachers' pay award. As well as the additional funding to support providers with the costs of employer contributions to the teachers' pension scheme which are due to increase from April 2024 are also included in the funding rate.

5.4.4 The central Early Years support costs will be funded from this block. Amounts held centrally are within the nationally defined limits of 5% of the Early Years Block.

5.4.5 This Block also includes allocations for Maintained Nursery Schools (MNS) to enable local authorities to protect the level of funding to MNS prior to the introduction of the EYNFF, Disability Access Fund (DAF) and Early Years Pupil Premium (EYPP).

5.4.6 The national funding rate for EYPP and DAF will increase in 2024-25 by £0.02 and £21 respectively.

6.0 2024-25 BUDGET CHANGES

6.1 Individual Schools Budget

6.1.1 Primary, Secondary and Academy Budgets £11.853m increase.

The significant changes within this area are as follows:

There is a net decrease in school rolls, which results in an overall budget decrease of £2.078m. There are 423 less pupils on the roll in October 2023 compared to October 2022. Primary numbers have reduced by 481 to 24,651 (a 1.91% reduction) while Secondary numbers have increased by 58 to 19,016 (a 0.31% increase).

The impact of changes in both the monetary value and pupil numbers applied to each of the funding formula elements has generated an increase in funding of £11.853m. This also includes any headroom which may arise if the funding allocated to schools from applying to the NFF is less than the overall funding available. For the purposes of the budget report £11.853 has been split proportionately between primary and secondary budgets. There is £0.018m increase of the national non-domestic rates (NNDR) in 2024-25.

It has been agreed that £0.018m 2023-24 growth and Falling Rolls fund will be carried forward to 2024-25. The headroom mentioned above will be added to this fund to be utilised in 2024-25.

6.1.2 High Needs Places £1.966m increase.

Places in specialist provision within Local Authority areas continue to be determined by each LA in consultation with schools and providers. There is flexibility to adjust this so that places broadly reflect take-up by pupils and this has resulted in a net increase of 211 places across special school, resourced provision and 6th Form/FE provision.

Although a growth in demand was included in the special schools' budget in 2023-24 as additional unallocated places, the demand for the academic year 2023-24 has exceeded the growth budget. The 2024-25 budget includes 88 additional places from April 24 and further 60 places planned to be allocated from September 24.

Base Project, a new resourced provision programme, has been set up in 2022-23 with 3 schools and currently have 68 places in total.

6.1.3 Hospital School £0.144m increase.

The increase reflects the change in the Hospital School element of the high needs block.

6.2 Early Years £14.752m increase.

6.2.1 The EY budget is based on the January 2023 census and the DfE estimated hours for working parents of 9 months to 3-year-old in line with the funding allocation as the table below, together with the comparison with January 2022 census numbers.

Table 4: Early Years pupil numbers

Pupil numbers	Jan-22	Jan-23	DfE estimate
Under 2s (PTE) – 7 months			703
2-year old's Disadvantaged (PTE)	1,008	891	
2-year old's Working parents (PTE)			1,387
3&4-year-old's Universal (PTE)	4,374	4,339	
3&4-year-old's Extended (PTE)	2,254	2,271	

EY funding is indicative at this time and the DSG allocation will be revised by census information for January 2024 and January 2025.

6.2.2 The breakdown of £14.752m increase for the EY block from the previous year is as the table below:

Table 5: EY budget increase 2024-25

Extended entitlement from 2024-25 £m	Funding rate increase in 2024-25 £m	Demand Change in 2024-25 £m	Supplementary Grant element in 2024-25 £m	Total £m
10.826	1.236	0.537	2.153	14.752

6.2.3 The expenditure budget relates mainly to the payments to providers, and this will aim to maximise the pass-through of funding to providers whilst ensuring that the service can respond to need and uncertainty.

6.3 Central School costs

The centrally held budgets for 2024-25 funded by the CSSB of the DSG have decreased by £0.036m. The services delivered by these budgets are explained below along with the reasons for any changes to the budget for 2024-25.

- School Admissions - this budget is required to meet the costs of supporting and administering the authority's school admissions process including the 11 plus. A small increase of £0.018m has been applied to this budget to reflect forecast staff costs.
- School redundancy costs - this budget covers the continuing cost of premature retirement of teachers and staff that have arisen from closing schools. No further closures are expected for 2024-25 thus costs to be incurred reflect historic commitments and are expected to be reduced by £0.002m.
- Licences and Subscriptions - the DfE purchases a single national licence for all state funded schools. Licences cover areas such as the Copyright Licence Agency, the Education Recording Agency, the Mechanical Copyright Protection Society, and a School Printed Music Licence. The 2024-25 budget has increased by 10% to £0.301m anticipating the cost increase, this is subject to change when the 2024-25 costs are announced by the DfE.

- Schools Forum - this budget will not be fully utilised in 2023-24 even though the meetings fully return to face-to-face meetings. Thus, it is proposed that the budget allocation has been removed in 2024-25 and any costs incurred will be covered by the contingency budget below.
- Contingency – this reflects the ‘headroom’ of £0.033m within the Central School Services Block for 2024-25.
- Contributions to combined budgets – School Funding Regulations continue to allow contributions to support services that would otherwise fall outside the Schools Budget. These budgets combine with other council resources for the educational benefit of children. There must be no new commitments or increases in expenditure from that agreed in 2012-13, and DfE expect that these costs will unwind over time. For this reason, funding from DfE has been reduced by 20% for 2024-25.

Table 5: Contributions to combined budget.

		23-24	24-25	Reduction	
		£m	£m	£m	%
School Improvement	Continued support for School Improvement Staff with permanent contracts	0.202	0.162	-0.040	-20%
LSCB	Contribution towards governance process for child protection	0.018	0.015	-0.003	-20%
School Intervention	Consultant Headteacher role supporting Primary & Secondary education	0.083	0.067	-0.016	-20%
PFI (Support)	Contribution towards the asset management costs to support PFI schools	0.038	0.030	-0.008	-20%
PFI (CLC)	Contribution towards the building costs for closed City Learning Centres	0.042	0.034	-0.008	-20%
Looked after Children Education Services	The service reviews the educational progress of Looked After Children, provides training to staff and some direct support to pupils	0.086	0.069	-0.017	-20%
Business Rates	Funding for continuing costs for VA Schools	0.065	0.052	-0.013	-20%
Governors Forum	Contribution towards the cost of maintaining the Forum	0.001	0.001	-0.000	-20%
Total		0.536	0.429	-0.107	-20%

- The PFI Affordability Gap budget is driven by the December RPI%. As this is not yet available, no change has been made to the 2024-25 budget at this time. The impact of the change in RPI% will be applied to the budget later in January 24 but as this is a Wirral Council funded budget, any change will have no impact on the DSG funding available to schools.
- The budget for retained duties of the former Education Services Grant (ESG) is uplifted by 2.42% for 2024-25 in line with the funding increase for the ongoing responsibilities as mentioned in 5.2.2 above. Overall, the DSG

contributes £1.2m towards the cost of services that were previously funded from the ESG. In 2023-24 the Forum agreed to de-delegate £0.5m on behalf of Maintained Primary, Secondary and Special Schools towards the full year costs of ESG General Duties.

6.4 De-delegated budgets

As in previous years the budgets held for Contingency, Special Staff (maternity, paternity, and trade union duties), the School Library Service, Insurance (Governors Aided), and Behaviour Support have been delegated to schools, and a decision will be required for any de-delegation from existing school budgets for these services. A decision will also be required for de-delegation of costs associated with the former General Duties of the ESG and School Improvement.

6.5 High Needs Pupils

6.5.1 Additional Resource £3.878m increase.

The budget for Units of Resource has been increased by £3.878m to reflect the on-going increase in applications for assessment and the costs. An increase has been applied for Primary pupils (£0.975m) and Secondary pupils (£2.768m) with the cost per EHCP pupil uplifted by 17.6%.

The other budgets in this area including the personal budget, interim education and inclusive practice, are adjusted based on the demand in 2023-24.

6.5.2 Top-Ups £3.338m increase.

The established banding system will be used to allocate element 3 top up funding to each specialist provision. This budget has been increased by £1.338m in line with the increase in places across special schools, resourced provision and 6th Form/FE provision as identified in the Individual Schools Budget section. An additional £2m has been set aside for a review of the top up band rates in 2024-25.

A small increase in funding for Exceptional Need, which is available to Special Schools where an assessed pupil's needs indicate that enhanced staffing is necessary. The budget has been increased by £0.101m to reflect the forecast increase in staff costs.

6.5.3 Independent Special Schools £4.26m increase.

The increase in the 2024-25 budget reflects the additional demand in places and inflation on the costs which were identified in 2023-24.

6.5.4 Support for SEN £0.25m increase.

The budget has been increased based on 2023-24 pressure due to the additional commissioned services and pay awards.

7.0 USE OF RESERVES

As reported in a separate report at this Forum meeting, the DSG reserve is expected to end 2023-24 with a cumulative deficit of £9.976m. The impact on the DSG reserve of the budget setting process reflects a worsening position for 2024-25 with a cumulative deficit of £20.893m.

8.0 BUDGET TIMETABLE

The Schools Budget and advice from Forum will be considered by the Policy and Resources Committee at its budget meeting on 13th February 2024 and will be approved by full Council as part of Budget Council on 26th February 2024.

9.0 Medium term forecast and DSG deficit management plan

As previously reported at the Schools Forum meetings, Wirral has been participating the DfE led the Delivering Better Value Programme (DBV). The diagnostic phase working with Newton Europe ended in December 23 and the budget setting for 2024-25 has utilised the findings and outputs from the phase.

The next step of the programme is working on the DSG deficit management plan with the Chartered Institute of Public Finance and Accountancy (CIPFA) for further deficit mitigations for the 2024-25 and the future years.

Further details of the DBV programme and the progress in the deficit management plan will be reported at the next Forum meeting.

10.0 RECOMMENDATIONS

10.1 That the views of the Schools Forum are sought on the Schools Budget for 2024-25.

10.2 That in accordance with ESFA guidelines the Schools Forum approves the reduced Contributions to Combined Budgets of £0.429m in 2024-25 for:

- School Improvement
- Local Safeguarding Children's Board
- School Intervention
- PFI Support
- PFI CLC
- Looked after Children Education Services
- Business Rates, and
- Governors Forum

10.3 That the Schools Budget and views of the Schools Forum are referred to the budget meeting of the Policy and Resources Committee on 13th February 2024.

Simone White
Director for Children, Families and Education

Appendix 1 - Schools Budget changes 2024-25

	£m	£m	£m
2023-24 Schools adjusted base budget			206.968
Add back Academy recoupment			131.179
2023-24 Gross Schools Budget			338.147
Budget changes:			
Individual Schools Budget			
Primary & Secondary:			
Net decrease in pupils on roll	-2.078		
Funding Formula elements	13.931	11.853	
Rates	-0.018		
Growth and Falling Rolls Fund	0.018		
High Needs:			
Special Schools places	1.563		
SEN Base places	0.316	1.966	
FE/6th Form places	0.087		
Hospital School	0.144	0.144	13.963
Early Years			
Early years demand		0.537	
Early years rate change		1.236	
Extended entitlement		10.826	
Supplementary Grant element		2.153	14.752
Central School Costs			
Admissions		0.018	
School Redundancy Costs		-0.002	
Licences & subscriptions		0.014	
Schools Forum		-0.011	
Contingency		0.033	
Combined budgets reduced contribution		-0.107	
Retained Duties		0.018	
PFI Affordability Gap		0.000	-0.036
High Needs Pupils			
Additional Resources:			
Units of resource	3.742	3.878	
Personal Budgets	0.135		
Top-ups:			
Top-ups	3.237		
Additional funding 2023-24	-0.976	3.338	
Additional funding 2024-25	0.975		
Exceptional need	0.101		
Independent provision		4.260	
Support for SEN uplift		0.250	11.726
Total Budget changes			40.405
2024-25 Gross Schools Budget			378.552
2024-25 Dedicated Schools Grant			365.046
2024-25 Call on reserve			10.917
2024-25 Net Schools Budget			2.590

Appendix 2 - Schools Budget 2024-25

	2023-24 Budget £	2023-24 Forecast (Nov-23) £	2024-25 Budget £
Individual Schools Budget			
Primary	95,740,421	95,740,421	127,789,603
Secondary	24,026,697	24,026,697	134,707,578
Special	14,861,376	15,339,488	16,535,978
Wirral Hospitals School	1,723,463	1,723,463	1,872,428
SEN Bases	1,272,499	1,253,243	2,386,500
Sixth Form/Further Education	146,000	204,000	1,701,000
Growth and Falling Rolls Fund	17,674		17,674
Individual Schools Budget Total	137,788,130	138,287,312	285,010,761
Central School Costs			
Early Years	21,430,382	21,430,382	36,182,760
Admissions	402,604	415,616	420,731
School Redundancy Costs	74,000	74,000	72,000
Licenses and subscriptions	286,976	286,976	301,325
Schools Forum	10,600	0	0
Contingency	17,718	0	51,198
Contribution to combined budgets	535,883	535,883	428,708
PFI Affordability Gap	2,589,553	2,589,553	2,589,553
Retained duties Central (ex-ESG)	730,000	730,000	747,700
Costs delegated to/de-delegated from schools			
Library Service	174,693	174,693	0
Insurances	23,677	7,000	0
School Specific contingencies	30,204	30,204	0
Special Staff Costs	758,135	773,154	0
Behaviour Support	139,698	139,698	0
School Improvement	468,754	468,754	0
Retained duties de-delegated (ex-ESG)	485,923	485,923	0
High Needs Pupils			
Additional resources	10,802,569	12,470,613	14,680,084
SEN top-ups	18,185,525	18,396,389	21,523,882
High Needs contingency	687,205	748,810	687,205
Independent Special Schools	8,795,780	10,969,559	13,055,645
Home Tuition	364,166	371,416	364,166
Support for SEN	2,127,817	2,309,123	2,377,817
Special School Transport	58,200	58,200	58,200
Non-delegated school costs Total	47,749,680	52,035,564	57,358,214
Total Costs	206,968,192	211,753,258	378,551,735
Funding			
Dedicated School Grant	-204,165,353	-203,949,623	-365,045,621
Contribution to/-from DSG Reserve	-213,286	-5,214,082	-10,916,561
Funding Total	-204,378,639	-209,163,705	-375,962,182
Grand Total	2,589,553	2,589,553	2,589,553
Surplus/-deficit b/fwd	-4,762,638	-4,762,638	-9,976,720
In year surplus/-deficit	-213,286	-5,214,082	-10,916,561
Surplus/-deficit cfwd	-4,975,924	-9,976,720	-20,893,281

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WIRRAL COUNCIL

SCHOOLS FORUM – 16th January 2024

REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

NOTIONAL SEN BUDGET 2024-25

1.0 EXECUTIVE SUMMARY

1.1 This report provides Schools Forum with an update on the latest Department for Education (DfE) guidance on the operation of the notional SEN budget within local school funding formulae, and seeks views of Schools Forum on the local authority's approach for calculating the Notional SEN Budget.

2.0 BACKGROUND

- 2.1 The requirement to identify a Notional SEN budget for maintained schools and academies is set out in regulation 11(3) of the School and Early Years Finance (England) Regulations 2023. Additional guidance is published in July 23 by the DfE in 'The Notional SEN Budget for Mainstream Schools: Operational Guide 2024 to 2025'.
- 2.2 The notional SEN budget is not a budget that is separate from a school's overall budget. It is an identified amount within a maintained school's delegated budget share or an academy's general annual grant (GAG). It is intended as a guide for a school's spending decisions and is neither a target nor a constraint on a school's duty to use its 'best endeavours' to secure special provision for its pupils with SEN.
- 2.3 It is important to note that the notional SEN budget is not intended to provide the high needs cost threshold set by the regulations (currently £6,000 per pupil per annum) for every pupil with SEN, as most such pupils' support will cost less than that. Nor is the notional SEN budget intended to provide a specific amount per pupil for those with lower additional support costs, although the local authority may make reasonable assumptions about what those costs might be for the purpose of ensuring that their schools' notional SEN budget calculation is realistic.

3.0 WIRRAL NOTIONAL SEN BUDGET AND 2024-25 REQUIREMENT

- 3.1 The Wirral notional SEN budget for 2023-24 is calculated as 100% of the funding received for low prior attainment factor. The total notional SEN budget contained within the funding formula in 2023-24 is £16.29m and it is equivalent to 6.5% of the total School Budget and notional SEN funding per eligible pupil is calculated as £1,059.66.
- 3.2 Based on the DfE document "Schools block funding formulae 2023 to 24", 75% of local authorities are allocating between 5% to 15% of schools block funding as notional SEN. The overall percentage of formula allocation which is designated as the notional SEN budget across all local authorities is 11.5%.

3.4 There is currently no national approach to the calculation of schools' notional budget for pupils with SEN through the National funding formula (NFF). The operational guide states that DfE would expect the notional SEN budget to include:

- a small part of the basic entitlement funding (national average weighting 3.19%)
- a larger part of deprivation funding, reflecting the higher prevalence of lower-level SEN amongst disadvantaged children. (national average weighting: Free School Meals 31.15% and IDACI 35.77%)
- the majority, or whole, of the low prior attainment factor funding as this is the best proxy for pupils with low cost, high incidence SEN. (national average weighting 84.76%)

3.5 For 2024-25 the DfE requires notional SEN funding, not attributable to pupils with an EHCP, must exceed £1,500 per other SEN pupil. LAs should aim for a figure of between £3,000 - £3,500 per other SEN pupil. Currently the calculated per pupil figure using the October 23 census data is £1,294 and it does not meet the requirement.

4.0 PROPOSED APPROACH FOR 2024-25 AND FUTURE YEARS

4.1 As there is a significant gap between the figure calculated by the Wirral approach and the DfE recommendation, it is recommended to have a consultation with schools to decide which funding formula factors should be used and their proportions.

4.2 It is proposed that the notional SEN budget for 2024-25 is set just above the minimum requirement of the DfE (£1,500) by allocating 1% of the Age Weighted Pupil Unit (AWPU) to clear the requirement. Schools then will be canvassed in the new financial year on a revised approach to set the budget at the DfE recommended level.

4.3 The notional SEN funding for each school would be higher than in previous years, meaning that a greater proportion of the School Budget Share or GAG is deemed to relate to the cost of support for SEN pupils. The School Budget Share or GAG itself is not impacted.

4.4 The position will be annually to take account of any pupil characteristic changes and any national approach from the DfE to the calculation and management of the Notional SEN budget.

5.0 RECOMMENDATIONS

7.1 That the Forum notes the report.

7.2 Schools Forum's views are sought on the proposal of calculation methodology for the notional SEN budget for 2024-25 and the consultation for the future years.

Simone White
Director of Children, Families and Education

WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM 16th JANUARY 2024

REPORT OF THE DIRECTOR FOR CHILDREN, FAMILIES AND EDUCATION

De-Delegation of School Budgets

1. EXECUTIVE SUMMARY

This report seeks a decision by Forum representatives of maintained schools on the possible de-delegation of a number of services to schools, where there is a preference to continue a central service.

2. BACKGROUND

In 2013-14 following DfE regulations a number of services were delegated to schools that were previously provided centrally by the LA. There are some of these service areas where Schools Forum members, in their relevant phase, are able to decide, on behalf of their schools, that funding should be de-delegated and taken out of formula budgets before schools receive them. These amounts would then continue to be held centrally to fund specific services for schools. Regulations provide for different decisions being made for each phase. The members eligible to vote are shown on the attached table.

3. BUDGETS FOR DE-DELEGATION

- Contingency

The budget for exceptional/unforeseen costs that it would be unreasonable for governing bodies to meet. There is no change to the per pupil rate of £2.15 for Secondary schools nor a change in the rate of £1.13 for Primary schools respectively.

- Special Staff Costs

Teacher maternity, paternity and trade union facility costs for both teaching and non-teaching staff.

The current forecast is slightly above the budget in the financial year 2023-24. This is partly due to the pay awards which have increased the maternity and paternity costs. Therefore, the rate for Special Staff (Maternity and Paternity) is increased by £1.31 to £35.74 for Secondary schools nor a change by £1.04 to £28.55 for Primary schools line with the pay awards from September 23.

With regard to Trade Union Facility Time, guidance confirms that representatives are entitled to reasonable paid time off during working hours to undertake Trade Union duties and relevant training. Wirral, like many LAs has a local agreement in place. The budget for facility time includes non-teacher representation. Where

funding is not de-delegated schools manage their own budget and make their own facility time arrangements. The rate for 2024-25 has increased by 14p to £3.85 per pupil, anticipating pay award for 2024-25 academic year.

- **School Library Service**

The provision of learning resources to schools, such as books, artefacts, posters, and DVDs. The School Library Service per pupil rate remains unchanged this year at £8.78 per Primary school pupil.

- **Insurance**

The cost of governor's liability insurance for Aided schools. Based on the past years expenditure, the rate for 2024-25 has reduced by 50p to £0.69 per pupil

- **Behaviour Support**

The cost of a small team working with Wirral's Primary, Secondary and special schools. The per SEN PA rates have increased by 4% to £30.20 for Secondary schools and £18.04 for Primary schools.

- **School Improvement**

School Improvement was included as a de-delegated service from September 2017 following the withdrawal of ESG. The budget supports the improvement / intervention programme with schools. There is no change to the per pupil rate of £7.92 for Secondary schools nor a change in the rate of £5.83 for Primary schools respectively.

- **Former ESG General Duties**

These are the cost of education services previously funded from Education Services Grant (ESG) to support maintained schools, including asset management (landlord) responsibilities, some premature retirement costs, and statutory / regulatory costs around, finance, LMS and internal audit. The rate has increased by £1.00 to £18.35 per pupil anticipating pay award for 2024-25.

- **The School Improvement and Monitoring and Brokerage Grant (SIMBG)**

From 2023-24 the SIMBG will be included in the de-delegated budget. The tiered funding model has been applied as a preferred option for the de-delegation of the SIMBG as agreed at the November 22 Forum meeting.

4. SUMMARY OF BUDGETS FOR DE-DELEGATION

The tables below identify the budget for primary and secondary schools, how the budget is allocated through the formula and the amount per pupil to be deducted if it is de-delegated.

Primary Budget	Amount Delegated £	Method of Delegation	Amount per Pupil £	Average per School (300 Pupils) £
Contingency	18,842	Pupil	1.13	339
Special Staff Costs (Maternity/Paternity)	476,094	Pupil	28.55	8,566
Special Staff Costs (Trade Union)	64,195	Pupil	3.85	1,155
School Library Service	146,398	Pupil	8.78	2,634
Insurance	11,505	Pupil	0.69	207
Behaviour Support	96,333	SEN PA **	18.04	*1,659
School Improvement	97,209	Pupil	5.83	1,749
Total	910,576	(*32% LPA pupils/**5,339)		16,309

Secondary Budget	Amount Delegated £	Method of Delegation	Amount per Pupil £	Average per School (1,000 Pupils) £
Contingency	5,831	Pupil	2.15	2,150
Special Staff Costs (Maternity/Paternity)	96,915	Pupil	35.74	35,736
Special Staff Costs (Trade Union)	10,441	Pupil	3.85	3,850
Behaviour Support	24,416	SEN PA **	30.20	*9,823
School Improvement	21,479	Pupil	7.92	7,920
Total	159,082	(*30% LPA pupils / **808)		59,478

Ex Education Service Grant (ESG) – General Duties

Primary and Secondary Budget	Amount	Method	Amount per Pupil £	Primary Average per School (300 Pupils) £	Secondary Average per School (1,000 Pupils) £
ESG General Duties	355,733	Pupil-Maintained Schools only	18.35	5,505	18,350
ESG General Duties– Special School Contribution	102,505				
Total	458,238				

School Improvement Monitoring and Brokerage Grant (SIMBG)

Primary and Secondary Budget	Amount	Method	Primary Average per School (300 Pupils) £	Secondary Average per School (1,000 Pupils) £
SIMBG	248,800	Tiered Funding Model	3,400	12,000
SIMBG– Special School Contribution	24,400			
Total	273,200			

Please note that the amounts for the de-delegation above are calculated with pupil numbers excluding schools which are planning to convert to academies before 1st April 24 and they might be adjusted if the conversion dates are delayed.

5. RECOMMENDATIONS

1. The Primary Forum Representatives agree to de-delegate each of the following budgets for the financial year 2024-25: -
 - a. Contingency
 - b. Special Staff Costs, including TU Facilities Time
 - c. School Library Service
 - d. Insurance
 - e. School Improvement
 - f. Behaviour support

2. The Primary Forum Representatives agree a contribution to former Education Services Grant costs of £305,968.

3. The Secondary Forum Representatives agree to de-delegate each of the following budgets for the financial year 2024-25: -
 - a. Contingency
 - b. Special Staff Costs, including TU Facilities Time
 - c. School Improvement
 - d. Behaviour support
4. The Secondary Forum Representatives agree a contribution to former Education Services Grant costs of £49,765.
5. The Special School Forum Representatives agree a contribution to former Education Services Grant costs of £102,505.
6. As per DfE guidance, the Primary and Secondary Forum Representatives agree a contribution to replace SIMBG costs of £248,800.
7. As per DfE guidance, the Special School Forum representatives agree a contribution to replace SIMBG costs of £24,400.

Simone White
Director for Children, Families and Education

APPENDICES

Appendix 1 Forum Members eligible to vote

Appendix 2 Additional information requested regarding de-delegated budgets

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Appendix 1

Forum Members eligible to vote

Group	Name	Category of Membership	School/establishment
Primary School Representatives	Lorraine Prescott	Primary Headteacher (Birkenhead S)	St Anne's Catholic
	Sue Ralph	Primary Headteacher (Birkenhead N)	St Michael & All Angels
	John McDonald	Primary Headteacher (Wallasey)	St Alban's Primary
	Kate Ball	Primary Headteacher (Deeside)	Brookdale
	Chris Mervyn	Primary Headteacher (Beb/Brom)	Brackenwood Infant School
	Charlotte Scott	Primary Governor	St George's Primary
	Shaun Allen	Primary Governor	Raeburn Avenue
	Julie Merry	Primary Governor	Overchurch Infants/Cathcart
Secondary School Representatives	Simon Goodwin	Secondary Headteacher	South Wirral High
Special School Representatives	Holly Barker	Special Headteacher	Stanley School
	Paula Wareing	Special Governor	Meadowside School

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1. Behaviour support service

- A toolkit of resources, support services, training, coaching and referral pathways.
- A checklist of activities, support and routes for children and young people with SEMH or behavioural needs.
- Developing relationships with schools to support inclusive practice and policy.
- Supporting schools with classroom management, behaviour management and quality first teaching.
- Co-production with LA and regional support services, developing shared guidance on Managed Moves and At Risk of Permanent exclusion and support with personalised and blended curriculum packages.

- 1.1 The Inclusion Team began supporting schools across the borough in June 2022. Since the introduction of the referral system in October 2022, below is a breakdown of referrals where schools have been supported with specific pupils;

Academic year 22-23 – 130 referrals

Academic year 23-24 so far – 90 referrals

Inclusion officers and strategy managers will work with schools to offer pupil specific support and guidance. In addition, they will support schools to work with other support services where appropriate.

- 1.2 As a proactive measure, a regular weekly Inclusion Drop-in service was introduced in April 2023. This was after satellite provisions were set-up in a primary and secondary setting and were successful. Feedback from staff, parents and young people was positive and therefore, this service has been rolled out for all schools to access. Currently, we have a provision where 6 schools can access this service weekly. To date, 35 schools sought advice through via the Inclusion Drop-in service. Advice has been offered regarding individual cases, classroom strategies and whole-setting approaches.
- 1.3 To support schools with training 6 members of the Inclusion Team became Intermediate Team Teach Trainers in November 2022. During the academic year 22-23, 104 members of Wirral's school staff have completed positive de-escalation training under the Team Teach banner. During the autumn term 23-24, 96 schools colleagues have had level 1 and level 2 Team Teach training.

- 1.4 The inclusion team also has registered restorative justice trainers. These staff members can facilitate restorative justice both one and three-day training courses, as well as support schools with restorative justice conferences and reintegration meetings. Wirral LA is in a leading position as it is currently able to offer training across the region and has successfully delivered RJ training to Safer School Police Officers in the summer term.

2 School Improvement Services

2.1 Headline data for key stages across Wirral

Early years Good Level of Development (GLD) – The Wirral figure has increased in 2023 to 65.2% from 62.9% an increase of 2.3% - the gap to national is 2% based on the national figure of 67.2%. The gap has narrowed by 0.3%.

Year 1 phonics on Wirral has increased in 2023 to 79.1% from 77.3% an increase of 1.4% - the Wirral is above the national figure by 0.1%, the gap has reduced by 1.7% - this is due to the national figure increasing by 3.4%.

Key stage 1 RWM combined – The Wirral figure has increased in 2023 to 51.8% from 48.7% an increase of 3.1%. the gap to national is 4.2% based on the national figure of 56%. The gap has narrowed by 0.4%.

Key stage 2 RWM combined – The Wirral figure has increased in 2023 to 55.7% from 52.3% an increase of 3.4%. the gap to national is 3.9% based on the national figure of 59.6%. The gap has narrowed by 2.5%. It is worth noting when compared to national and North West figures for RWM combined is the smallest gap when looking at the last 5 reporting year.

Key stage 4 – The Wirral figure for progress 8 has decreased in 2023 to -0.1 from 0.0 a decrease of 0.1. The gap to national is 0.1 based on the national figure of 0. The gap to nation is now 0.1, last year the Wirral had no gap.

- 2.2 The 2023-2024 CPD offer from Wirral LA has been the most comprehensive offer for several years. It has included elements that are directly relevant to classroom practitioners as well as to leaders and has had a broad remit from classroom practice to subject leadership to subject-specific foci as well as leadership and wellbeing elements.

Over 70 schools responded to the offer and all schools and schools who did not respond to the offer were personally contacted and supported. There was a different pricing structure for academies to that for maintained schools. Schools with challenging budgets positions were supported so that their staff were able to access core CPD on offer including English and Maths training.

Where possible, when facilitators and venues were sourced in-house, we made the training free to maintained schools. The CPD offer was benchmarked against competitors. We felt that, with the support of Schools' Forum, it was important to ensure that the cost of the offer was reflective of the financial situations faced by schools but also meant that we were able to offer presenters and facilitators of the highest quality. The costs paid by schools generally represented the habitation

costs for the courses. Where costs were incurred, the best possible rate was negotiated with the conference space provider

Over the course of the 2023-2024 academic year there will have been 85 sessions offered to school staff. During those sessions, there will be over 2500 individual attendees at Wirral's CPD sessions this year. This is a fantastic uptake and a great achievement, given the starting point of the programme. The most popular sessions were for EYFS practitioners and for Maths. Additionally, 49 schools signed up for moderation opportunities at KS1 and KS2 which will be facilitated by our own moderation teams.

In addition to this offer, we have also started to develop a small (but increasing) number of Sharing Good Practice sessions for schools to both host and be part of. They have proved very popular, and we continue to encourage schools to celebrate their good practice and share these successes with their colleagues across the borough. This, along with our plans for CPD in 2024-2025 will hopefully continue to develop a self-sustaining, self-supporting system and will continue to see improvements in accountability measures at both KS2 and KS4.

Feedback for the offer is wholly positive. Feedback suggests that schools appreciated the early publication of the offer and were grateful for the individualised CPD booking list before the summer holidays. Incidental conversations with colleagues have suggested that they are pleased with the broad remit of the training offer and the opportunity to train individual teachers as well as middle & senior leaders.

Reminders were sent out, including a calendar, early in Autumn Term. Feedback systems using QR codes have not worked well and capturing this effectively is at the forefront of consideration for the 2024-2025 programme.

- 2.3 The QA visits from the School Assurance Professionals have been embedded during 2023-24 adjusting the SAP programme having taken into account any feedback from the previous year.

All maintained schools will have a scheduled visit during this academic year, planned to accommodate proximity to a due Ofsted inspection, any previous SAP visit or a recent Ofsted inspection during 2023. Headteachers were contacted in advance with the agenda and an agreed timetable of the day. The focus for this annual visit for Primary Schools was on mathematics, because of concerns over LA outcomes, and history, although some schools chose a different foundation subject if their SIP or recent Ofsted inspection had included monitoring of this subject. The focus for Special schools was bespoke to their needs talking advice from a SEN expert and with a view to recent National and Ofsted reports.

During the autumn term 2023 there were 19 schools who had a SAP visit and there are 30 visits planned for the spring term and 19 for the summer term. The visits have been overwhelmingly well received, some schools have enjoyed follow up visits according to their banding and some headteachers have requested additional SAP days following their visit.

A few of the positive messages are shown below;

'Also, we had our SAP visit yesterday with xxx and just wanted to let you know that it was such a positive experience. She is so knowledgeable, very thorough but understood our context, we would love to keep her as our SAP if possible, I feel she can really support us on our journey to outstanding.'

'Just wanted to share some feedback following our SAP and SIP visits last week. xxx worked in the school on Monday as part of our involvement in the EY project and xxx was with us at the Primary school on Tuesday'

'Both SAPs were excellent and brought a high level of challenge whilst remaining supportive.'

This Quality Assurance programme now ensures that the LA fulfils its statutory duty and has an expert report at least annually an all-maintained schools in Wirral.

- 2.4 The schools in Bands 3 or 4 have been offered additional training and had resources provided for this academic year which are being supplemented as the programme develops.

This includes;

- Question Level Analysis of Key Stage 2 SATs from 2023 (DAISI) to understand what the KS2 assessments are telling the school and to inform future curriculum planning.
- CPD on self evaluation, action planning and school improvement (22 Sep 23)
- CPD on Monitoring and schedules (4 Dec 23)
- DAISI, assessment and intervention (2 Feb 24)

Schools in Bands 3 and 4 have received a range of CPD and in-school bespoke support to aid their improvement journey. This has been noted both by headteachers and Ofsted inspectors.

- 2.5 Several Specialist Leaders in English, Mathematics and Early Years have worked with experts and had extensive bespoke CPD to enable them to support other colleagues in Wirral schools. They have begun to support specific areas of the curriculum in settings other than their own, have grown in expertise and confidence and will contribute to developing a self-sustaining, self-supporting system. The opportunity to become a specialist leader will be offered again in the spring term as has been requested.

WIRRAL COUNCIL

WIRRAL SCHOOLS' FORUM 16th January 2024

REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

Forum Membership Review

1.0 EXECUTIVE SUMMARY

1.1 This report describes the current representation of the Forum and membership changes.

1.2 Current Representation

The table below details the current makeup of the Wirral Schools' Forum representation and when the terms of office are due to expire.

Schools Forum Membership							
Total Membership	Role	2019-2023	2020-2024	2021-2025	2022-2026	2023-2027	Total
5	Primary Headteachers			2	1	2	5
4	Primary Governors			2	1		3
1	Secondary Headteachers		1				1
1	Special Headteacher					1	1
1	Special Governors					1	1
1	Nursery Representative				1		1
13	Total Schools Membership						12
9	Academy Representative			2		4	6
9	Total Academy Membership						6
1	Non-teacher representative			1			1
1	Teacher representative					1	1
1	Catholic Diocese			1			1
1	Church of England Diocese			1			1
1	16-19 representative						0
3	PVI Early Years Providers			1			1
8	Total Non-Schools Membership						5
30	Total Membership	0	1	10	3	9	23

1.4 There are currently 7 vacancies

- There is 1 x 16-19 provider vacancy. No nominations have been received.
- There is 1 x Primary Governor vacancy. Expressions of interest will be sent out shortly to fill this position.
- There are 3 x academy representative vacancies. The expressions of interest have been sent out but at the time of writing this report, no nominations have been received.
- There are 2 PVI Early Years Providers vacancies. Expressions of interest will be sent out shortly to fill this position as the terms of expired end of December.

1.5 New Members

There has been **one** new member since the September report, as follows: -

Kate Williams, member of Wirral Unison as the Non-teacher Representative replacing Gillian Harris.

Appendix 1 identifies all current members and their role on School's Forum.

1.6 Membership Changes

Regulations governing the forum requires school/academy membership to take account of pupil weighting.

Current	Pupil no's Jan 23 Census	Expected	
9 Primary	21,263	44.2%	8.4
1 Secondary	3,842	8.0%	1.5
9 Academy	22,975	47.8%	9.1
19.0	48,080	100.0%	19.0

1.7 As the primary schools are converting to academy, this reduces the membership of maintained primary schools to 8 but increases the maintained secondary schools back up to 2. The regulations allow for flexibility during periods of change so it would be reasonable to keep 9 primary members and 1 secondary member as we await more academy conversions later in the year.

2.0 Recommendations

2.1 Forum notes the report.

Simone White
Director of Children, Families and Education

Appendix 1

SCHOOLS' FORUM MEMBERSHIP as at January 2024					
Group	Name	Category of Membership	School/Establishment	Term of Office	
Schools	Lorraine Prescott	Primary Headteacher (Birkenhead S)	St Anne's Catholic	Oct-23	Sep-27
Schools	Sue Ralph	Primary Headteacher (Birkenhead N)	St Michael & All Angels	Sep-21	Aug-25
Schools	John McDonald	Primary Headteacher	St Albans Primary	Sep-21	Aug-25
Schools	Kate Ball	Primary Headteacher (Deeside)	Brookdale	Sep-23	Aug-27
Schools	Chris Mervyn	Primary Headteacher	Brackenwood Infants	May-22	Apr-26
Schools	Charlotte Scott	Primary Governor	St Georges Primary	Aug-21	Jul-25
Schools	Shaun Allen	Primary Governor	Raeburn Avenue	Nov-22	Oct-26
Schools	Julie Merry	Primary Governor	Overchurch Infants/Cathcart	Jan-21	Dec-24
Schools	Vacancy	Primary Governor			
Schools	Simon Goodwin	Secondary Headteacher	South Wirral High	Sep-20	Aug-24
Schools	Holly Barker	Special Headteacher	Stanley School	Sep-23	Aug-27
Schools	Paula Wareing	Special Governor	Meadowside School	Feb-23	Jan-27
Schools	Kathryn Kennedy	Nursery Representative	Ganneys Meadow	Mar-22	Feb-26
Academy	Moira Loftus	Academy Rep (Vice-Chair)	Townfield Primary	Jun-21	May-25
Academy	Adrian Whiteley	Academy Rep (Chair)	St Anselms	Sep-23	Aug-27
Academy	Vacancy	Academy Rep			
Academy	Emma Ball	Academy Rep	Greasby Junior	Jan-23	Dec-27
Academy	Mark Bellamy	Academy Rep	Hilbre High School	Sep-21	Aug-25
Academy	Luci Jones	Academy Rep	Cheshire Academies Trust (Gayt	Sep-23	Aug-27
Academy	Vacancy	Academy Rep			
Academy	Vacancy	Academy Rep			
Academy	Carys Wynn-Green	Academy Rep	Concordia	Sep-23	Aug-27
Non-Schools	Kate Williams	Non-teacher representative	Wirral Unison	Dec-23	Nov-27
Non-Schools	Michael Farrelly	Teacher representative	NEU	Sep-23	Aug-27
Non-Schools	Joanne Proctor	Catholic Diocese	Christ the King	Sep-21	Aug-25
Non-Schools	Brian McGregor	Church of England Diocese	Woochurch CE Primary	Sep-21	Aug-25
Non-Schools	Vacancy	16-19 Provider			
Non-Schools	Vacancy	PVI Early Years Providers			
Non-Schools	Vacancy	PVI Early Years Providers			
Non-Schools	Jessica Trigg	PVI Early Years Providers	The Mulberry Tree	Oct-21	Sep-25

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WIRRAL SCHOOLS FORUM – 16th January 2024 WORK PLAN

Meeting Date	Tuesday 26th September 2023	Tuesday 21st November 2023	Tuesday 16th January 2024	March 2024 Provisional meeting	Tuesday 11 th June 2024
Virtual / Physical	Physical	Physical	Physical		Physical
	Elect chair & vice chair				
Budget	Budget monitoring 2023-24 Growth & Falling Rolls Fund		Budget Monitoring 23-24 Q3 Schools Budget 24-25 De-delegation of budgets School Balances update		Provisional outturn 2023-24 Schools Budget 2024-25 School Balances update
Consultation	2024-25 National Funding Formula for Schools, High Needs and Early Years funding arrangements if new info out	National Funding Formula Update for 2024-25			- - - -
DfE Regs & guidelines	Schools Forum Membership If updated <ul style="list-style-type: none"> DfE Operational Guide School Finance Regs Scheme for Financing Schools 	Schools Forum Membership If updated <ul style="list-style-type: none"> DfE Operational Guide School Finance Regs Scheme for Financing Schools	Schools Forum Membership If updated <ul style="list-style-type: none"> DfE Operational Guide School Finance Regs Scheme for Financing Schools		Schools Forum Membership If updated <ul style="list-style-type: none"> DfE Operational Guide School Finance Regs Scheme for Financing Schools
Working Groups	Early Years	High Needs			High Needs Early Years
Other	Wirral Traded Services Update Delivering Better Value Budget Monitoring Package for Schools Excessive Clawback Mechanism Consultation	De-delegated services <ul style="list-style-type: none"> Contingency, Special Staff Costs, Insurance Library Service <ul style="list-style-type: none"> School Improvement <ul style="list-style-type: none"> Behaviour Support Edsential Update School Admissions	Sensory Support Service Update Energy update Wirral		LACES /LAC PP Update Home Continuing and Education Service (HCES) update Agree Meeting dates

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