



Wirral Schools Forum

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| Date: | Wednesday, 4 July 2018 |
| Time: | 6.00 p.m. |
| Venue: | Council Chamber, Wallasey Town Hall |

Contact Officer: Sue Ashley
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AGENDA

1. **MINUTES OF THE MEETING HELD ON 17TH MAY (Pages 1 - 4)**
2. **MATTERS ARISING**
3. **ENERGY UPDATE (Pages 5 - 6)**
4. **WIRRAL TRADED SERVICES UPDATE (Pages 7 - 8)**
5. **SCHOOL FORMULA (Pages 9 - 12)**
6. **EARLY YEARS WORKING GROUP UPDATE (Pages 13 - 14)**
7. **SCHOOL BUDGET MONITORING (Pages 15 - 20)**
8. **HIGH NEEDS UPDATE (Pages 21 - 26)**
9. **ADMISSIONS UPDATE (Pages 27 - 30)**
10. **HIGH NEEDS WORKING GROUP**
Verbal Update
11. **HOSPITAL SCHOOL UPDATE (Pages 31 - 36)**
12. **SCHOOL BALANCES AND RESERVES (Pages 37 - 38)**
13. **WORKPLAN (Pages 39 - 40)**

14. ANY OTHER BUSINESS

WIRRAL SCHOOLS' FORUM

17th May 2018

MINUTES

Present: Adrian Whitely (Chair)

Schools Group

| | |
|----------------------|------------|
| L Ayling | M Forber |
| S Baker (Vice Chair) | S Jamieson |
| M Bellamy | T Kelly |
| J Billinge | R Mahony |
| J Bush | E Neal |
| B Cassidy | T Taylor |
| S Elliot (Deputy) | V Woods |

Non-Schools Group

| | |
|----------|----------|
| I Harris | N Prance |
|----------|----------|

In Attendance:

| | |
|-----------|---------------|
| S Allen | J Forsey |
| S Ashley | Cllr B Mooney |
| R Bridges | M Morris |
| A Davies | A Roberts |
| C Fenlon | S Talbot |

Apologies:

| | |
|--------------|---------------|
| S Bennett | S Higginson |
| M Bulmer | H Johnson |
| B Chadwick | N Lightwing |
| S Davies | Cllr C Meaden |
| Cllr P Hayes | A Rycroft |
| L Ireland | A Waller |

1. Minutes from the Meeting held on 17th January

The minutes from the meeting were accepted as a true record.

2. Matters Arising

There were no matters arising.

3. Edsential Business Plan

Ian McGrady updated Forum on Edsential's second year of trading as a Community Interest Company. The company have had a solid year and continued to reduce costs whilst concentrating on quality. A small loss was made but they are now back on track. Edsential are planning to offer new services, including supporting mental health in schools, early years consultants, Family Cooking Schools, bid writing and Duke of

Edinburgh awards. Edsential will be consulting with schools shortly on a mechanism for distributing their grant fund of £50k.

Resolved

Forum noted the report

4. Home Tuition Update and Charging Policy

Jackie Forsey briefed Forum on the service provided by the Home and Continuing Education Service, highlighting the review of the service that had been undertaken to be able to respond to the changing demands of schools and the LA, particularly around mental health. The impact on services are detailed in the report. A charge to schools who use the service of £80 per week, after the first 12 weeks will be introduced, this is comparable to 10 hours of Alternative Provision. The Service Level Agreement and the information sheet detailing the referral process are included with the minutes.

Resolved

Forum noted the report

5. Early Years Update

Carol Fenlon updated the Forum on the uptake of 2, 3 and 4 year old funding and the implementation of the extended offer. An issue with Universal Credits has affected the uptake of 2 year old places as some children were omitted from the eligibility list. This was brought to the attention of the DfE at the National Conference.

The Extended offer had a 43% increase between autumn 17 and spring 18. Funded workshops to engage providers and support uptake of extended hours has been successful, with outcomes being discussed at the next working group in June.

Gill Billinge requested that the EY group look at the impact of the 15 hour extension on primary school nursery classes.

Resolved

Forum noted the report and agreed the areas for discussion by the working group

6. High Needs Funding Arrangements

Shaun Allen summarised the revisions to the document "Funding Arrangements for High Needs Special Education Needs Pupils and Students". These were:-

- The changes to place funding for schools with bases, where they are the subsidiary school for a child in the base.
- Changes to the funding of special schools and resourced provision where there are surplus places at the end of an academic year.
- The change to the deduction of budget from schools for exclusions in line with DfE Guidance, from September 2018.

Forum requested a change to the report as follows:-

- Section 3.3 to be amended to be more in line with the SEN Code of Practice by allowing for exceptional circumstances.

The document will be discussed at the next High Needs Working Group.

Ongoing discussions Adrian Whitley agreed to remain as Forum Chair for another year to avoid any conflict of interest Steve Baker may have with discussions on High Needs Funding.

Resolved

Forum noted the report

7. High Needs Review Proposals

Margaret Morris informed the group of the interim measures to be put in place to ensure there are enough specialist places whilst the external High Needs Review is being carried out. They are:-

- Extra places for Ellera Park and Stanley school from September 2018
- The Observatory School Y5/Y6 base, which opened in April 2018
- An additional SEMH base at Woodslee
- Extra places from September 18 at Foxfield for CLD pupils
- Oldershaw Year 7 base, increasing their overall base places by 4.
- £20k each for Mosslands and Ridgeway to provide a 1 year pilot for year 7 pupils who require extra support in the transition to secondary school.

These will be discussed further at the next High Needs working group.

Arrangements to commission an external review of High Needs are being agreed by the Procurement Team.

Resolved

The Report was noted

8. Update on School Balances

Sue Ashley advised the Forum that school balances at 31st March 2018 increased slightly to £10.2m. Indications are that school balances will reduce significantly over the next 2 years. The LA continues to work with headteachers and governors to ensure that budgets balance or to support 3 year plans where they do not. The ESFA has provided the LA with an analytical tool which will be used with exiting processes to identify schools that may be at risk.

Resolved

Forum noted the report

9. Schools Budget Update 2018-19

Shaun Allen updated the Forum on the Schools budget changes that have been made since the previous report in January. They are:-

- Primary and secondary schools budgets have reduced to take account of changes for de-delegation and academy recoupmnt.
- Early Years budgets have been adjusted and reduced to take account of the Early Years Census and a fall in rolls for 2, 3 & 4 year olds.
- A PFI adjustment in respect of the affordability gap.
- High needs adjustments for 6th forms and academy provision

Resolved

Forum noted the report

10. The Growth Fund

Shaun Allen informed the Forum of the Growth fund that has been included in the 18-19 budget to support schools who take pupils from Kingsway Academy.

Resolved

Forum noted the report and referred the matter to the Formula working group to agree on the scope of the growth fund, specifically to take some account of year 7 pupils who otherwise would have gone to Kingsway.

11. School Funding Letter to the Secretary of State

Forum endorsed the Chair's letter to the Secretary of State for Education expressing concerns over funding. It was agreed that the letter would also be shared with all local MPs and the Shadow Education Secretary Andrea Rayner.

12. Schools Budget Provisional Outturn 2017-18

Shaun Allen outlined the year end position for the 2017-18 Schools budget which is still subject to audit. There is an underspend of £1m mainly within Early Years. The following amounts are to be ringfenced:-

- £145k to support schools who admitted Kingsway pupils between September 17 and March 18 who have not yet received funding
- The Inclusive Practice Fund underspend of £181.5k
- The DAF underspend of £54.7k

Resolved

Forum noted the report and agreed the amounts to be ringfenced.

13. Membership Update

Sue Ashley updated Forum on the membership. Andy Waller, Governor at West Kirby Grammar is the new Academy rep. The vacancy for Primary Governor rep has not yet been filled, but a further request for nominations will be sent out shortly.

The early year's sector requested extra members to reflect the growth in this sector. If the forum representation was based on pupil population this would provide an extra representative in the early year's sector.

Resolved

Forum noted the report

Forum agreed to increase the early year's representation by one, which will be the chair of the NDA.

14. Working Groups Future Dates

Early Years Group - 4th June
High Needs Group - 18th June
Formula Group - 19th June

15. Workplan

The workplan was provided for information.

The dates of the meetings for the current academic year are:-

Wednesday 4th July 2018

16. Any Other Business

The Chair thanked Andrew Roberts for all his hard work during his time supporting Schools Forum.

WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM – 4 JULY 2018

REPORT OF THE CORPORATE DIRECTOR FOR DELIVERY SERVICES/ASSISTANT CHIEF EXECUTIVE

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 2018/19 financial year.

2. PURPOSE OF THIS UPDATE

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

- Increases in natural gas and electricity prices that were anticipated for the 2018/19 financial year in January 2018.
- Unit prices achieved by the Crown Commercial Service (CCS) framework.
- Budget change suggestions to ensure provision for purchase of electricity and natural gas over the 2018/19 Financial Year.

The report content is only applicable to accounts that are part of the CCS framework agreement. The Council holds no information for schools that make their own energy supply arrangements and cannot make any meaningful comment on these accounts.

3. ANTICIPATED 2018/19 PRICE INCREASES FROM JANUARY 2018

Under the framework arrangement, natural gas and electricity is purchased on our behalf by CCS over a six month window that ran from 1 September 2017 to 31 March 2018. In January 2017, a CCS budget forecast suggested the following increases could be expected if conditions did not change.

| Energy type | Final delivered cost: % annual change 2018 vs 2017 (02/01/18) | Climate Change Levy (CCL) increase |
|-------------------------------|---|------------------------------------|
| Gas (Supplied by Corona) | 5.18% | 2.5% |
| HH (Supplied by EdF) | 10.69% | 2.6% |
| NHH (Supplied by British Gas) | 10.43% | 2.6% |

4. AVERAGE UNIT PRICES ACHIEVED BY CCS

The CCS risk managed approach has reduced the increases that were a real possibility in January. The final average unit prices achieved for 2018/19 are shown overleaf together with previous years for reference and context.

| | 2015/16 (p/kWh) | 2016/17 (p/kWh) | 2017/18 (p/kWh) | 2018/19 (p/kWh) |
|---------------------------------|--------------------|--------------------|--------------------|--------------------|
| HH Elec. Day (07:00 to 24:00) | 9.407 | 11.391 | 11.8287 | 8.7081 |
| HH Elec. Night (00:00 to 07:00) | 6.704 | 6.886 | 7.6427 | 7.7204 |
| NHH Electricity | 11.554 | 11.241 | 12.642 | 13.509 |

| | | | | |
|-------------|-------|-------|-------|-------|
| Natural Gas | 1.893 | 1.916 | 1.926 | 2.096 |
|-------------|-------|-------|-------|-------|

Please note that these unit prices are indicative as each supply point is individually priced.

The HH electricity p/kWh day rate has dropped sharply. This is because all our HH supplies are priced on a Grid Supply Point (GSP) basis and means that non-energy costs such as transmission and distribution used of system charges (TNUoS and DUoS) are included as 'pass-through' costs. This eliminates the need for the supplier to estimate these charges and to include any contingency for major fluctuations. This ensures maximum billing transparency and reduces the risk of excess charges being levied.

All unit prices (p/kWh) for natural gas under the CCS fall into the range between 1.8747 p/kWh and 2.1766 p/kWh. This is an increase from last year because of the rising costs on the wholesale markets. A business energy comparison website suggests that the best price commercially available on 11 June 2018 was 2.79p/kWh, 33% higher than the unit prices that Crown Commercial Service has achieved.

5. INCREASE IN PROVISION FOR GAS & ELECTRICITY EXPENDITURE

Market forces have led to a rise in energy prices that, if patterns of consumption do not alter significantly, inevitably mean higher expenditure on energy. Weather conditions, especially over the winter period, are significant as a cold winter will increase the use of gas for heating and costs will rise. Similarly, increasing the use of electricity with additional equipment or increasing the hours of use will also push up costs.

In order to determine realistic recommendations, sample calculations comparing £/kWh for 2017/18 to the new pricing information that applies to the current financial year were carried out. The projections included all energy costs, standing charges, metering costs, availability costs and the Climate Change Levy.

The increase in the cost of HH electricity has been calculated at approximately 1.4%. Climate Change Levy has increased by 2.5%. Rises in non-energy costs are set by the Government regulator, Ofgem and must be applied by all suppliers. These now contribute up to 58% of an electricity bill. From 2017/18, non-energy costs for the HH (EdF) portfolio have increased by 28.7%. A proportion of these costs are used to fund Government schemes including the Feed-in-tariff scheme, the Renewables Obligation and Contracts for Difference.

The following increases from 2018/19 expenditure are suggested as precautionary provisions to take account of the increased prices.

- Increase provision for **natural gas** supplied by Corona by 7.8%
- Increase provision for **electricity** supplied by British Gas Business by 12.4%
- Increase provision for **electricity** supplied by EdF by 10%

6. RECOMMENDATIONS

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

David Armstrong
Corporate Director for Delivery Services/Assistant Chief Executive

WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM Wednesday 4th July 2018

REPORT OF THE CORPORATE DIRECTOR FOR CHILDREN

WIRRAL TRADED SERVICES FOR SCHOOLS

1. EXECUTIVE SUMMARY

This report provides a brief update on Wirral Traded Services for schools.



2. BACKGROUND

Wirral Council operates a range of traded services to its schools and beyond. The current range of Wirral Traded Services for 2018/19 includes:

- Construction and Facilities Management
- Data Protection Officer
- Distribution Services
- Educational Social Welfare Service
- Financial Support for Schools
- Health & Safety
- HR Consultancy Services
- Independent School Appeals Clerking (Admission and Exclusions)
- IT Services for Schools
- Legal Services
- Minority Ethnic Achievement Service (MEAS)
- Occupational Health
- Payroll & Human Resources Administration
- Risk and Insurance
- Software Support
- Schools' Library Service
- Wirral Community Patrol
- Wirral Printing Services

Some of these services, such as Educational Social Welfare Service and the Minority Ethnic Achievement Service provide their service almost exclusively for schools. Others, such as Payroll & Human Resources Administration and Health & Safety are integrated into providing their services for other customers such as the Council.

Wirral Traded Services is coordinated by a Senior Manager and for 2018/19, a Wirral Traded Services brochure was produced and sent out to all schools on Wirral. This included a summary of each of the annual service level agreements (SLA) on offer from the services. New for this year was an online sign up process which was generally well received by schools.

New offers from Wirral Traded Services for 2018/19 included:

- Independent School Appeals Clerking (Admission and Exclusions)
- Legal Services
- Wirral Printing Services
- Data Protection Officer offer covering GDPR
- New offer from Financial Support for Academy Schools
- New offer from School Library Service for Special Schools and Year 7 Transition Service
- New On-line Management Information Tool (Insight) on offer from Payroll & Human Resources Administration
- New pricing model from Wirral Community Patrol
- New separate stand-alone asbestos cover from Construction and Facilities Management

WESCOM contains the full SLAs for each of the services. The brochure was also put online at <http://www.wirraltradedservices.org.uk/> to gain an internet presence for the services.

There was a successful launch event attended by over 60 school colleagues in January 2018 at the Floral Pavilion.

Overall Wirral Traded Services generated income in 17/18 of around £4.5 million. All of the services look to at least break even so that their income at least matches their expenditure. Collectively they employ nearly 150 Wirral Council staff (around 120 FTE).

For 2018/19 the level of annual buyback for schools has held up across most of the traded services with some services winning back school customers. Legal Services have gained 23 schools this year for their new offer, whilst 32 schools have signed up for the new Data Protection Officer service. Projected income figures for 18/19 suggest that income will be up across Wirral Traded Services on the previous year by about 2%. This is partly down to increasing the range of products with new services for schools. This increase in income has been achieved despite increased competition and also greater financial challenges for schools with their budgets.

Every maintained and academy school across Wirral buys at least one of the annual SLAs on offer. There are over 1000 individual SLA agreements from Wirral Traded Services across Wirral Schools.

RECOMMENDATIONS

1. That the Forum notes the report.

Paul Boyce
Corporate Director for Children

WIRRAL COUNCIL

SCHOOLS FORUM – 4th JULY 2018

REPORT OF THE CORPORATE DIRECTOR FOR CHILDREN

SCHOOLS FUNDING FORMULA 2019-20

1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to update Schools Forum on the meeting of the Schools Funding Formula working group, and to set out the process for the consultation in respect of the 2019-20 funding formula.

2.0 FUNDING FORMULA WORKING GROUP

2.1 The Schools Funding Formula working group met on Tuesday 19th June 2018. Based on indicative allocations in the Schools Block of Dedicated Schools Grant released by DfE in September 2017, and subsequent changes in pupil numbers, it is assumed that in 2019-20 the Schools Block will increase by approximately £1.5m, or 0.8%:

| <u>DSG Schools Block</u> | 2017-18 | 2018-19 | | 2019-20 | Illustrative change | |
|--|-------------|-------------|----------|-------------|---------------------|------|
| | Total | Total | Increase | Total | £ | % |
| Indicative allocations per DfE Sep-17 | 194,723,498 | 197,758,549 | 1.6% | 199,313,312 | 1,554,762 | 0.8% |
| Actual allocation per DfE Dec-17 | | 198,653,459 | | | | |
| Assumed 2019-20 allocation (0.8% increase) | | | | 200,215,257 | 1,561,798 | 0.8% |

2.2 By 2019-20 the Wirral allocation will be in line with the National Funding Formula, although Local Authorities will still be able to distribute this via a local formula in 2019-20.

2.3 The local formula has to have a Minimum Funding Guarantee (MFG) between minus 1.5% and 0.5%. This protects schools from large changes to their budget year on year on a per pupil basis. The 2018-19 formula included 0% MFG to maintain stability and ensure no school lost funding (per pupil). However, the higher the MFG percentage (i.e. the more protection included) in the formula the longer it will take to bring Wirral's local formula in line with the National Funding Formula.

2.4 The DfE will release the 2019-20 NFF along with indicative allocations based on October 2017 census data in July 2018. A number of models were presented at to the working group to give the illustrative impact to individual schools of each model. The models were based on October 2017 pupil data, with no inflation to the overall funding pot, and with a 0.5% top-slice but no deduction for de-delegation. This was purely to make the models comparable to the current 2018-19 budgets, and therefore show what the allocations would have been if the models had been introduced from April 2018. However, no assumptions have been made at this stage about a further top-slice.

2.5 The following models were chosen as they reflect the most significant changes in the National Funding Formula, and were presented with both a 0% MFG and a -1.5% MFG:

1. Current formula, unchanged from 2018-19 formula (therefore this model reflected the actual 2018-19 allocations);

2. National Funding Formula factor values;

3. Current formula but adopting the NFF factor values for Deprivation, including the introduction of Ever6. This means that a significantly higher number of pupils attracted deprivation funding so the deprivation factor reaches a broader range of children with a wider range of needs, but may be seen as less targeted.

4. Current formula but adopting the NFF factor values and criteria for Low Prior Attainment. This significantly increases the amount allocated through the LPA factor with an offsetting reduction in the total AWPU allocation. Wirral traditionally has had a relatively low allocation of resources to this area. Allocations are based on a good level of development in primary schools, and KS2 data in secondary schools.

5. Current formula but with all schools lump sum increased from £100,000 to £110,000. This will also help move money from Secondary Schools to Primary Schools, which for Wirral is a key feature of the National Funding Formula.

2.6 The working group generally felt that a bridge was needed from the current formula to the NFF to avoid any big changes the following year, and Primary representatives recognised the difficulties faced by Secondary School, particularly due to the lagged funding they receive for Kingsway pupils they have admitted.

3.0 CONSULTATION

3.1 Local Authorities must consult with all schools and the Schools Forum on how the funding formula should look. It is likely that if there is no agreement, the existing formula would be retained by Cabinet. Feedback from last year's consultation highlighted that schools require more clarity in the consultation, although this must be balanced with not overloading them with information. Schools could be provided with example model schools (e.g. 11-16, 11-18, Grammar schools etc.) and the impact of each model to help understand the impact of changes more generally. This would be in addition to information on all allocations for their own and all other schools.

3.2 It was agreed that Primary and Secondary representatives will take the models presented to the working group to discuss amongst Primary and Secondary Headteacher groups to set the scene and outline the consultation process.

3.3 Following the DfE release of the updated National Funding Formula and indicative allocations, the models in 2.5 will then be updated to reflect the new total indicative Schools Block value and each model will be shown with both a -1.5% and 0% MFG. They will be based on October 2017 pupil data, and will be shown without the 0.5% top-slice for High Needs.

- 3.4 Last year's consultation started mid-September, but the intention is to start the consultation earlier this year so that it runs from the beginning of September up until half term. Following a review of the responses a recommendation for the 2019-20 School Funding Formula will be presented to Schools Forum in November.
- 3.5 The consultation paper will also include any specific changes where consultation is required for High Needs.
- 3.6 It is likely that a further consultation will then follow regarding the potential for a 0.5% top-slice for High Needs.

3.0 RECOMMENDATION

- 3.1 That the Forum notes the report.
- 3.2 That consultation regarding the schools funding formula runs for 6 weeks from early September until October half term, and a recommendation for the 2019-20 formula is subsequently presented to Schools Forum in November.
- 3.2 That the top-slice from the Schools Block to support High needs is consulted on separately following the agreement of the funding formula.

Paul Boyce
Corporate Director for Children

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**WIRRAL COUNCIL
SCHOOLS FORUM – 4th July 2018
REPORT OF THE CORPORATE DIRECTOR FOR CHILDREN
EARLY YEARS SUFFICIENCY AND FUNDING UPDATE**

1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to update the School Forum of discussions at the recent Early Years working group meeting, 4th June 2018 around the following; central staffing costs, Inclusive Practice Fund, Disability Access Fund and the Base Rate for early entitlement funding.

2.0 CENTRAL STAFFING COSTS;

Since the setup of the Early Years Business and Quality improvement team there have been significant policy developments in relation to the Local Authorities early years statutory requirements, specifically delivering on the 30 hour (additional 15 hours) model, for eligible working families.

In April 2017 the Schools Forum approved an additional allocation of 140K for some start up projects, in the main dedicated to the implementation of the 30 hour model. Inclusive was the introduction of a project officer post which would implement, embed and oversee the functionalities of the 30 hour offer. As this is still in its infancy, with the expectation there will be further growth it has been timely to review this post and those others within the central team structure.

As a result it has been identified that to effectively fulfil all the business functionalities within the statutory requirements 3 project officer roles with designated themes would be most effective;

- X1 FTE - 2 year funded –existing post
- x1 FTE - 30 hour offer – temporary post to move to permanent
- x1 FTE - cohort tracking and sufficiency – create as a new post

To achieve this proposal it would be required to retain the 140k allocated within 17-18 as a year on year addition to the central staffing costs, with consideration it remains within the permitted 5% pass through rate.

Furthermore, the fund would also allow a deeper dive into central staffing gaps.

3.0 INCLUSIVE PRACTICE FUND;

3.1 For 18/19 the allocated budget is unchanged at £450k. Following a review of processes to access the fund, which included opening it up to children in F1 nursery class provision in Primary schools, it was agreed an award would be for an extended period of an academic year rather than across a term. Consequently the roll out of processes to the wider sector presented with some delay to referrals coming in at the start of the academic year of 17/18, resulting with a variance at year end of £181,501.

It was proposed to safeguard this into 18/19 as given the projections of on average hourly rate of £4.30 per hour, for a maximum of 15 hours per week across 38 weeks per term the potential is to support 184 children across the academic year.

4.0 DISABILITY ACCESS FUND;

4.1 The Disability Access Fund was introduced in 2017, where a one off payment of £615 would be accessible to families where a child has a disability and can demonstrate accessing Disability Living Allowance benefit.

Central government devolved £96k to Wirral for DAF in 2017-18. To date; £41,820 has been awarded, equating to 68 children supported. It is not expected that the Department for Education will recoup of variances in this budget (subject to review in July 18). Therefore to further maximise this budget the proposal is to roll over the remainder in order to issue one off purchases of specialist equipment to a setting where a child requires a medical item to aid access into their free 3+4 early years education.

5.0 BASE RATE;

5.1 Despite there being variances in year of the take up of 2, 3 + 4 year funded placements it is recognised that the full costs of funding the extended offer have not yet actualised resulting in applying caution to the budget. As a result the base rate will remain as set however it is acknowledged that the sector are absorbing increased pressures in terms of pay awards, pensions and business rates/rents therefore it will remain as an option to review year on year.

6.0 RECOMMENDATIONS

6.1 Forum agrees to secure the £140k into central staffing costs year on year in order to re-model the central staffing functions.

6.2 Forum agrees to maximise both the Inclusive Practice Fund and Disability Access Fund as carry forwards to continue to support SEND children into the new processes.

Paul Boyce
Corporate Director for Children

WIRRAL COUNCIL

SCHOOLS FORUM – 4th JULY 2018

REPORT OF THE CORPORATE DIRECTOR FOR CHILDREN

SCHOOLS BUDGET MONITORING REPORT 2018/19

1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to update the Forum on the Schools Budget position and anticipated variations in the current year.

2.0 ANTICIPATED BUDGET VARIATIONS

2.1 The table attached summarises the Schools Budget for 2018-19. Comments on specific budget areas and associated pressures are set out below.

2.2 Primary, Secondary and Special Schools

Town Lane Infants converted to Academy status as part of a Multi-Academy Trust with 3 Cheshire Schools from 1st June 2018. The final balance for this school at the date of conversion will be finalised in the coming months.

Schools converting to Academy status result in a reduction in DSG grant income received, which is matched by reduced spending through the delegated budget. A number of Primary Schools are expected to convert from 1st September 2018.

A secondary school is also expected to convert from 1st January 2019. As this is a sponsored Academy any balance outstanding at the point of conversion does not transfer to the Academy. As previously agreed Contingency is used for this purpose. The Local Authority is working closely with the school to reduce any anticipated deficit before the conversion date.

2.3 Early Years Grant

The Early Years budget of £20.2m reflects the funding required for 2, 3 and 4 year olds who are entitled to receive free Early Education and Early Years Pupil Premium, as well as the 3 and 4 year old extended offer. The budget for this is based on the January 2018 census.

2.4 Special Staff Costs

This budget is currently projecting no variance, and will be monitored closely throughout the year. It is broken down as follows:

| | Budget |
|--|----------------|
| | £ |
| Maternity, Paternity & Other Staff Costs | 558,500 |
| TU Facilities | 82,300 |
| Insurance & Recharges | 6,900 |
| Total | 647,700 |

2.5 Contribution to Combined Budgets

The combined budgets of £0.9m are broken down as follows:

| | Budget |
|----------------------------------|----------------|
| | £ |
| School Improvement | 330,000 |
| Discretionary Rate Relief Top Up | 106,600 |
| LCSB contribution | 30,000 |
| Governors Forum | 2,200 |
| PFI Support Team | 61,800 |
| LACES | 140,500 |
| School Intervention | 136,000 |
| CLC PFI | 68,500 |
| Total | 875,600 |

It is anticipated that these budgets will be fully committed. The provision and future contractual commitments need to be considered as the Department for Education has indicated that DSG support for these areas will be gradually reduced from 2020-21, although they do not have any specific plans at this stage as to how this will be carried out.

2.6 School Specific Contingencies

There is a contingency budget of £95,800 to take into account any specific costs that need to be met. The purpose of this budget is to meet exceptional and unforeseen costs, which would be unreasonable to expect the schools and governing bodies to bear including Business Rates charges in excess of those estimated in the budget, and support for schools in Key Stage 1 where a larger than usual reception class (above the published admission numbers) requires additional staff. As described in paragraph 2.2 any balance remaining at the point of a closing school will also be charged here.

2.7 High Needs Contingency

This budget is £280k and is committed to fund the 90% SEN guarantee for maintained schools (£160k in 2017-18).

£20k was also included in the budget to fund unfilled Resource Base Places that remain at £10k. However, the ESFA have made a late adjustment, deducting an additional £104k from Wirral's High Needs allocation to pay directly to Academies where their Resource Base places are empty or where the base is not the pupil's home school (or the places are empty). For these instances Wirral will claim the pupil funding elements from the home school to offset this where appropriate.

In addition to this there are pressures on this budget in 2018-19 of approximately £400,000 (full year cost £650k) for place funding, (as well as increasing top-ups by approximately £240k, full year cost £400k), due to the need to create extra capacity from September 2018 following Education, Health and Care Needs Assessments in Special Schools with limited capacity to admit children over their place numbers. The alternative would be to place the children in more expensive places in Independent Special Schools. These additional demands on the budget will commit the DSG reserve to support High Needs pressures.

2.8 High Needs Review (2018-19 Schools Block 0.5% Top-Slice)

£993,300 top-sliced from the Schools Block has been ring-fenced to fund changes resulting from the review of High Needs. The 12 month pilot provision for High Needs bases in Woodslee Primary School, The Observatory School and Oldershaw resulting from the initial review will cost approximately £150,000 in 2018-19 for place funding (full year cost £200,000), as well as increasing top-up costs by approximately £280k (full year cost £390k). In total this 12 month pilot would commit approximately £590k from this budget, leaving a balance of £403,300 remaining at this time.

2.9 Special Education Needs Top Ups

A budget of £9.6m funds the Pupil Led Top Up funding in Specialist Provision, Resource Bases, FE, Colleges and Alternative Provision. Budgets have been increased to reflect increased numbers and greater needs moving towards higher top-up bands.

Top-up costs will increase from September 2018 due to the increased places as outlined in 2.7. The Summer Term census figures are not yet available but as previously reported pressures on High Needs budgets continue to increase nationally and this area will continue to be monitored throughout the year.

| | Budget |
|--|------------------|
| | £ |
| Top Ups for Maintained Special Schools | 6,917,000 |
| Top Ups for Resourced provision | 724,400 |
| Alternative provision | 433,300 |
| FE and 6 TH Form Top Ups | 946,000 |
| Additional Nursing Support | 106,600 |
| Exceptional Needs | 504,100 |
| Total | 9,631,400 |

2.10 Special Education Needs Statements

The budget has been increased in this area to reflect the greater number and cost of EHCPs. Numbers vary during the year, and will continue to be monitored closely.

2.11 Independent Special Schools

The budget in this area was reduced slightly in 2018-19, and is based on 84 students at an average annual cost of £45k. There are currently 78 students placed at Independent Special Schools, although this is likely to increase in September.

2.12 Home Tuition

The Home Tuition budget was increased to ensure the service can meet its statutory requirements, and will be monitored and reported to Forum throughout the year.

2.13 DSG - £170,320,500

The revised Dedicated Schools Grant (DSG) for 2018/19 will be published in July and will confirm Wirral's allocation.

| | |
|---------------------------------------|--------------------|
| Original DSG Budget | 258,168,300 |
| Academy Recoupment – Schools Block | (82,937,300) |
| Academy Recoupment – High Needs Block | (3,818,000) |
| Early Years reduction (Jan-17 census) | (979,000) |
| Page 17 | 170,434,000 |

3.0 UPDATE ON SPECIFIC RESERVES

3.1 The final figure of DSG reserves carried forward into 2018/19 was £2.3m as follows:

- Job Evaluation and Pay Harmonisation Reserve - £0.65m

- DSG Reserve - £1.5m

| | £ |
|---|----------------|
| DSG Carry Forward from 2017/18 | 1,492,100 |
| Further support for former Kingsway Pupils admitted 2017-18 | (145,000) |
| Inclusive Practice Fund | (181,500) |
| Disability Access Fund | (54,700) |
| Support for High Needs pressures | (£541,500) |
| Balance | 569,400 |

- City Learning Centres - £0.045m

This reserve will be used for some remaining final closure / school reuse costs in relation to the former City Learning Centres.

- Early Years £0.094m

This reserve is expected to fund development in the Early Years Portal.

4.0 CONCLUSION

4.1 The Schools Budget will be monitored throughout the year, and any projected variances against budget will be reported to the Forum.

5.0 RECOMMENDATIONS

5.1 That the Forum notes the report.

Paul Boyce
Corporate Director for Children

Appendix 1 – Budget Variations 2018/19

| | Revised Budget 2018-19 |
|---|-------------------------------|
| Individual Schools Budget | |
| Primary | 90,692,500 |
| Secondary | 22,388,900 |
| Special | 8,964,400 |
| Wirral Hospital Schools | 1,354,300 |
| SEN Bases | 1,012,000 |
| Alternative Provision | 0 |
| 6th Form / Further Education | 0 |
| Early Years | 20,155,100 |
| Individual Schools Budget Total | 144,567,200 |
| Central School Costs | |
| Early Years | 518,700 |
| Admissions | 372,200 |
| School Closure / Retirement Costs | 60,000 |
| Licenses and subscriptions | 233,100 |
| Schools Forum | 10,600 |
| Contribution to combined budgets | 875,600 |
| PFI Affordability Gap | 963,400 |
| Retained duties (ex-ESG) | 730,000 |
| Costs delegated to / de-delegated from schools | |
| Library service | 180,900 |
| Insurances | 27,500 |
| School Specific contingencies | 95,800 |
| Special Staff costs | 647,700 |
| School meals | 19,300 |
| Behaviour Support | 81,300 |
| School Improvement | 166,100 |
| General duties (ex-ESG) | 499,300 |
| High Needs pupils | |
| Statements | 4,280,800 |
| SEN top-ups | 9,631,400 |
| High Needs contingency | 279,900 |
| Independent Special Schools | 3,700,000 |
| Home Tuition | 400,500 |
| Exclusions | 60,000 |
| Support for SEN | 1,971,500 |
| Special School Transport | 58,200 |
| Schools Block 0.5% top-slice | 993,300 |
| Non-delegated school costs total | 26,857,100 |
| Total School and Central costs | 171,424,300 |
| Dedicated Schools Grant | (170,434,000) |
| Use of Reserves | 0 |
| Grand Total | 990,300 |

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WIRRAL COUNCIL

REPORT OF THE CORPORATE DIRECTOR FOR CHILDREN

Proposal for Increase in SEND Places for 2018-19

1.0 EXECUTIVE SUMMARY

This report outlines a proposed organisational change to increase the number of specialist places in Wirral. The changes will be considered by the High Needs Working Group, prior to the Forum's next meeting in July. The places proposed are at a range of schools (both mainstream and special) and enable those with identified need to be effectively supported. This will enhance existing provision and ensure that there is a sufficient supply of places in specialist provision in Wirral.

The increase in places is being considered at a time when an external review of mainstream provision for special educational needs will be undertaken. For this reason, any agreed changes are for a one-year period only.

2.0 PROPOSALS TO INCREASE SPECIALIST AND BASE PROVISION

Wirral's SEND population has been increasing in recent years and this has been regularly reported to School's Forum. The number of children and young people placed in special schools has risen throughout 2017-18. During 2017-2018 there have been pressures on the Local Authority to place children following an Education, Health and Care Needs Assessment in special schools with the majority having limited capacity to admit children over their place numbers. The pressures were particularly noted in the primary special school sector, in schools catering for Complex Learning Difficulties and Social Emotional, Mental Health Difficulties.

As initial assessments are nearly completed the Local Authority has a clearer picture of places required for 2018-2019 and current indications are that there will be a need to create extra capacity for September 2018.

The illustrative full year cost is outlined below.

SPECIAL SCHOOL FIGURES

| Primary School | Admission Number | April 2018 Numbers | Sept 2018 Numbers | Additional places required | Proposal to increase place funding | Increase in funding per place | Top Up Funding |
|-----------------|------------------|--------------------|-------------------|----------------------------|------------------------------------|-------------------------------|-----------------|
| Elleray Park | 110 | 115 | 128 | 18 | 128 | £180,000 | £92,300 |
| Stanley | 120 | 132 | 141 | 21 | 141 | £210,000 | £106,500 |
| Foxfield | 133 | 134 | 138 | 5 | 138 | £50,000 | £35,500 |
| The Observatory | 55 | 57 | 76 | 21 | 76 | £210,000 | £170,100 |
| Total | 418 | 438 | 483 | 64 | 483 | £650,000 | £404,400 |

The proposals have recently been discussed with relevant headteachers and Chairs of Governing Bodies. Following the meeting and further communication from the two schools funding has been agreed for The Observatory and Foxfield School. Elleray Park and Stanley School are holding further discussions regarding the funding that will be required and will report back to the Local Authority.

Interim Pilot Schemes (utilising the 0.5% top slice from school budgets)

The following proposals arise from the initial review of High Needs provision and should also be considered by the High Needs Working Group. These are all new provision and have been agreed because of demands faced by the LA and a commitment to develop inclusive provision.

| School Pilot Provision | Admission Number | April 2018 Numbers | Sept 2018 Numbers | Additional places required | Increase in funding per place | Additional Top Up Funding |
|---|-------------------------|---------------------------|--------------------------|-----------------------------------|--------------------------------------|----------------------------------|
| Woodslee SEMH Base | 8 | | 8 | 8 | £48,000 | £48,000 |
| The Observatory Y5/Y6 Base | 8 | 8 | 6 | 6 | £60,000 | £36,600 |
| Oldershaw Year 7 Base | 9 | | 9 | 9 | | £72,000 |
| Oldershaw Increase in numbers (inc y7 base) | 20 | 20 | 25 | 5 | £30,000 | |
| Hilbre Year 7 Base | 10 | | 10 | 10 | | £80,000 |
| Hilbre Increase in numbers (inc y7 base) | 30 | | 31 | 1 | £6,000 | £6,000 |
| Ridgeway | | | | | | £20,000 |
| Mosslands | | | | | | £20,000 |
| Total | | | | | £144,000 | £282,600 |

The rise in children being identified as having complex learning difficulties has challenged the Local Authority in placing children in the two schools during 2017-2018. Numbers for September 2018 are currently being finalised and likely to be in the region of 269. Current places commissioned are 230. An additional 39 places will be required. This number does not take account of any additional children being identified by early years settings as possibly having complex learning difficulties.

The proposed increase in numbers will put pressure on the current accommodation in both schools. However, there are inclusive opportunities in the mainstream setting that are currently being explored and this would enable the children to receive the expertise of the special school/ mainstream staff whilst being on the roll of the special school. No major capital investment is planned at either school in light of the external review taking place.

Foxfield School

The growing number of children with complex learning difficulties in the primary sector is now impacting upon numbers required in the secondary sector. An additional 5 places will be required by the Local Authority for September 2018.

The Observatory School

The school is currently funded for 55 places. Historically the school has started the beginning of the academic year at a figure lower than the agreed 55 places (In September 2017 it was 50) and then other pupils join during the academic year, increasing the pupil numbers to 60+ pupils. The identified number for September 2018 is 76, requiring the LA to increase place funding by 21.

Pilot Schemes

The Observatory School Y5/Y6 Base

The school has designed provision for Key Stage 2 year 5- year 6 pupils for 8 pupils, who were out of school. This has been in operation since 1st April 2018 and has been an unqualified success. All the pupils in the provision were non-attenders at other schools but in the last couple of months there has been 100% attendance apart from medical appointments. This provision has ensured that the Local Authority has not had to utilise very expensive out-of-borough provision.

The top up funding that has been allocated for this base is £6,100 per pupil.

Woodslee SEMH Base

Woodslee Primary School is currently working with Alison Grimshaw and Dr Tina Goodson (Clinical Psychologist) to design a specialist base for KS1/ lower KS2 for children with Social, Emotional, Mental Health. The base will be established using the 'Nuture' principles and provide a high level of support for those children who are currently finding it difficult to access mainstream provision. The aim is to re-integrate these pupils into mainstream provision.

The top up funding that has been allocated for this base is £6,000 per pupil.

Oldershaw

The number of pupils in the Resource Provision at Oldershaw continues to grow. This year the school has agreed to offer provision for 9 year 7 pupils who historically would have attended a Special School. This group of pupils have been identified as benefitting from mainstream provision but will need a primary delivery for part of their educational provision. This group of children increases the number in the base from 20 to 25.

Place funding has been agreed for those 5 additional places at £6,000 per place (this takes account the AWPU received)

The top up funding that has been allocated for this primary designed base is £8,000 per pupil, one the highest Top Up bands. These top ups will be reviewed in 12 months time as pupils become more settled within the school.

Hilbre

The number of pupils in the Resource Provision at Hilbre is above the places commissioned. This year the school has agreed to offer provision for 10 year 7 pupils who historically would have attended a Special School. This group of pupils have been identified as benefitting from mainstream provision but will need a primary delivery for part of their educational provision. This group of children increases the number in the base to 31.

Place funding has been agreed for the 1 additional place at £6,000 (this takes account the AWPU received)

The top up funding that has been allocated for this primary designed base is £8,000 per pupil one the highest Top Up bands. These top ups will be reviewed in 12 months' time as pupils become more settled within the school.

Ridgeway/ Mosslands

Ridgeway and Mosslands are setting up a pilot for year 7 pupils who require an enhanced transition into secondary school and will required small group delivery that mirrors the primary model.

These two projects are 1-year pilot projects and will be evaluated by both schools during 2018-2019.

£20,000 will be committed from the Local Authority to each school to support the initiatives.

Financial Implications

The exact financial implications arising from these proposals will be considered by the High Needs Working Group and will be brought to the next Forum meeting in July. The changes described would commit the High Needs DSG Reserve and introduce the needed additional provision funded by the top slice.

Funding for provision in later years is an area that has been included as part of the externally commissioned review of High Needs. This will be the subject of ongoing discussions, together with a consideration of the estimated numbers for future years.

Recommendations

Following consideration by the working group the views of the Forum are sought on this report.

Margaret Morris

Interim Senior Commissioning Manager SEND

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REPORT OF THE CORPORATE DIRECTOR FOR CHILDREN

MAINSTREAM SCHOOL ADMISSIONS

1. EXECUTIVE SUMMARY

This report provides a brief outline of Mainstream Admissions during the most recently completed 2016-2017 admission year and an update on upcoming changes to selective testing.

2.0 Mainstream Admissions

2.1 Statutory roles of the Mainstream Admissions team include the administration and allocation of places in all primary and secondary schools, and representing the Council in school place appeals.

For entry to primary/secondary school in September 2017 there were over 3,800 applications for primary school (Foundation 2) and 3,700 for secondary schools (Year 7). The team co-ordinates admission to school with all own admission authority schools within Wirral and other admission authorities in England.

2.2 The team produces appeal statements and presents appeals on behalf of all community and voluntary controlled (VC) schools as a statutory function. For information, the outcomes for the community and VC school appeals handled by the team are shown below.

| | Withdrawn (%) | Resolved (%) | Refused (%) | Agreed (%) | Total |
|-----------|---------------|--------------|-------------|------------|-------|
| 2014-2015 | 61 (23%) | 66 (24%) | 125 (46%) | 18 (7%) | 270 |
| 2015-2016 | 97 (26%) | 82 (22%) | 173 (47%) | 20 (5%) | 372 |
| 2016-2017 | 48 (25%) | 43 (23%) | 92 (48%) | 7 (4%) | 190 |

Outcome of appeals lodged for community and voluntary controlled primary and secondary schools by academic year.

The outcome of appeals was proportionately similar to previous years.

2.3 The team administers the grammar school selection tests on behalf of the four non-Catholic grammar schools. Around 1,800 children are tested each year. The team also administers the Independent Assessment Board, and is responsible for disseminating the outcome of the selective tests to parents.

2.4 As well as admissions to Foundation 2 and Year 7, the team also processes around 2,000 in-year transfers between and into/out of Wirral schools.

2.5 The Council's Fair Access Protocol applies to "hard to place" young people, for example with a history of poor attendance or significant behavioural issues. 26 young people were placed through the Fair Access Protocol in 2016-2017, compared to 12 in the previous year.

2.6 Negotiated Transfers (NTs) ceased as of January 2018 (see below), but were still operational during the 2016-2017 Academic year. NTs followed a similar process to Managed Moves for young people at risk of Permanent Exclusion, however NTs were intended for young people with lower level behaviour and/or attendance issues who might benefit from a fresh start in another Wirral school. NTs were discretionary and were overseen by a former secondary headteacher. 112 NTs were instigated in 2016-2017 of which 66 resulted in a successful transfer of school, 3 were withdrawn by the parent and 43 were ultimately unsuccessful.

- 2.6 The Wirral Fair Access Protocol arrangements, including hard to place young people, Managed Moves, Negotiated Transfers and those who are permanently excluded, have been re-evaluated in 2017-2018 in order to provide a clear consistent process leading to the most appropriate outcome for young people. New Negotiated Transfers are no longer taking place – there remains at time of writing one young person whose pre-existing Negotiated Transfer is still on-going.
- 2.7 The role of the Fair Access Panel, with a wider membership including officers with responsibility for alternative provision special educational needs and educational psychology, exclusions etc. has expanded to also include decisions on applications from schools for young people to be placed on the Alternative Provision Census, decisions on Managed Move destinations, and re-integration decisions for young people with a single permanent exclusion.

3.0 Update on changes to selective testing

- 3.1 The non-Catholic grammar schools comprise the Wirral Consortium of schools for testing purposes. The test provider is The University of Durham (CEM). Following from the original two year contract covering the 2016-17 and 2017-18 testing period, a further one year contract extension has been signed for the 2018-2019 testing period.

Testing in primary schools

- 3.2 Approximately 1800 pupils sit the non-Catholic selective test each year, of which more than two-thirds currently sit the test in their own Wirral primary school (72% for 2017-2018 tests). Wirral primary and junior schools with 10 or more pupils entered for the test are automatically a test centre, others may decide to volunteer, even if only 1 child is entered.

Pupils attending the grammar test centres are largely those from outside Wirral or private schools (23%), with a minority from Wirral primary schools (5%). The latter applies where only a small number of pupils are entered for the test (fewer than 10) and the school has decided not to take up the option to test children in school. This has been the protocol for several years.

- 3.3 Selective test working groups including primary school representatives, met in 2014 and in 2016, the outcome of these was that arrangements for testing in primary schools continued as in previous years. However, in Spring 2018, the Primary Headteachers Consultation Group (PHCG) asked primary cluster groups to vote again on the continuing involvement of primary schools in the selective test arrangements.

The outcome at the PHCG meeting in April 2018 was that the majority of primary cluster group representatives voted that primary schools should end their involvement (13 agreed; 7 disagreed; 1 abstention) from September 2019 onwards.

- 3.4 The test venue is not specified in the Council's co-ordinated scheme for admission to secondary schools and does not formally require any consultation. It has been agreed that the PHCG's decision will not come into effect until September 2019 testing for September 2020, that is, children currently in Year 4.

There is no impact on current Year 5 children in relation to testing in September 2018.

- 3.5 The Authority has met with the four grammar headteachers to begin to discuss the logistical implications of all pupils being tested at a test centre in September 2019.

This discussion included the possibility of providing additional local non-school venues, the day of testing (Saturday vs Monday), staggered test times, providing

sufficient school invigilators, arrangements for children with additional needs, and so on. These discussions are on-going.

- 3.6 Primary schools should be aware that this change will mean that from September 2019 onwards, all pupils registered to take the non-Catholic selective test will need to provide photographic proof of identity using an official form in order to sit the test, and verification of the ID forms will be the responsibility of primary schools.

Impact of Academy status

- 3.7 All schools acting as a test centre are asked to sign a declaration in relation to the security and confidentiality of the test and test materials each year, as well as declaring any staff who may have a personal conflict, e.g. a child taking the test, and ensuring those staff have no involvement with the test at any stage.

Following discussions with the test provider, Wirral primary schools that have converted to Academy status, where the school has previously acted as a test centre, can continue to act as test centres for September 2018 providing the declarations are completed and all guidance is followed. Any such school that has not previously acted as a selective test centre will not be permitted to do so.

Independent Assessment Board

- 3.8 The Council's co-ordinated scheme for admission to secondary schools includes an Independent Assessment Board (IAB), which in other areas is called a review. This is a process whereby primary schools can refer individual pupils who did not reach the standard for non-Catholic grammar school but where this does not, in their view, reflect the child's ability, for consideration. Over 260 referrals were made in 2016-2017, of which about a third were upheld.

- 3.9 The IAB comprises grammar and primary school headteachers, with the primary heads participating on a rota basis. The IAB then decides whether or not the pupil can be deemed to have reached the standard for entry for grammar school, taking into account evidence of their academic ability and any mitigating circumstances.

- 3.10 Parents whose child was referred to the IAB but was not deemed to have reached the standard, retain their right of appeal to an Independent Appeal Panel after 1st March in the year of allocation, as do parents of children who were not referred.

- 3.11 The PHCG majority vote in April 2018 was to end primary school involvement in the IAB process, however this is not a decision that schools can take.

As the IAB forms part of the co-ordinated scheme for admission to secondary schools, discontinuing the IAB process would need to form part of a general formal consultation on the Council's co-ordinated scheme. Permission to consult on this item will be sought in Autumn 2018, with the consultation then expected later that term, on which any interested person can comment.

- 3.12 At present, the test is planned to allow an appropriate number of pupils to reach the standard for grammar school, taking into account an "allowance" for the IAB to supplement this number after review. If the IAB is revoked, for the September 2019 testing cohort onwards, the test provider would be asked to increase the number of pupils meeting the standard at the outset. Those pupils who did not reach the standard but whose parents still believe their child should attend a grammar school, would retain their right to an appeal to an Independent Appeal Panel after 1st March, just as now.

- 3.13 In terms of the School Admissions team's workload, this would be a reduction in administration, for example in terms of document preparation, staff time and communications with schools, which would allow the team to focus on other aspects of the admission of pupils to secondary schools at a very demanding time of year.

3.14 It may, however, result in an increase in the number of school appeals submitted after 1st March. In relation to three of the four grammar schools, this involves the Council's School Appeals team within Legal Services who may therefore experience a higher workload if this change goes ahead, as well as some additional costs to the grammar schools themselves.

4.0 Finance

4.1 The overall budget for School Admissions in 2018-2019 is £372,200. The costs include:

| | |
|-----------------------------|-----------|
| Staffing (8.6 FTE) | £262,600 |
| Software and implementation | £64,800 |
| Selective tests | £40,000 |
| Overheads | £43,300 |
| Income/recharges | (£38,500) |
| Total | £372,200 |

RECOMMENDATIONS

1. That the Forum notes the report.

Paul Boyce
Corporate Director for Children

WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM 4th JULY 2018

REPORT OF THE CORPORATE DIRECTOR FOR CHILDREN

WIRRAL HOSPITALS' SCHOOL: UPDATE AND FUNDING

1. EXECUTIVE SUMMARY

Wirral Hospitals' School (WHS) and, in particular, Joseph Paxton Campus (JPC) is a vital part of Wirral's response to its statutory duty to provide a suitable education for children who cannot attend school because of their medical needs. 1 in 10 school children will suffer from a diagnosable mental health disorder¹, with the long-term impact and associated costs of these disorders on both child and adult services clearly evidenced². Almost all referrals to JPC come directly from schools with supporting evidence provided by CAMHS. In its last Ofsted inspection, WHS was rated as Outstanding and has since been awarded Autism Accreditation status by the National Autistic Society.

This report updates the Forum about the school and makes proposals for a continued provision that will cater for the needs of the young people, families and schools of Wirral by providing the appropriate level of resources, support, and teaching to ensure the best possible outcomes for this highly vulnerable section of our community.

2. BACKGROUND

Wirral Hospitals' School consists of two main branches: Bedside teaching to children admitted to Ward 52 at Arrowe Park Hospital, and the main school site, JPC, in Claughton Village, which has a nominal roll of 80 students.

Admissions to JPC are controlled via a panel process involving the Headteacher and senior managers from CAMHS, ESW service, Home Education Service and the LA. The admissions panel is chaired by a senior Educational Psychologist, Simon Ward. Each case is assessed on its individual merits, with the basis for admission being that the child is unable to be educated in a mainstream setting, at the present time, due to their health needs.

All admissions are on a placement basis, with the aim being to return students to mainstream education when their health allows. In reality, and in line with the evidence of the critical ages for young people's mental health², most students are unable to return to mainstream education until they have completed their GCSEs. Consequently, and in accordance with the intended short-term nature of the provision, JPC is set up to take most students in Years 10 or 11, with very limited places at KS3 – 30%.

¹ Future in Mind: Promoting, protecting and improving our children and young people's mental health and wellbeing NHS England DoH 2015 Chapter 3 page 25.

²Transforming Young People's Mental Health Provision: A Green Paper. DfE December 2017. Chapter 1 Case for Action.

The majority of the students referred to JPC have acute mental health needs, usually around anxiety or depression. Most have self-harmed and/or expressed suicidal ideation. A significant minority have attempted suicide prior to referral. At the point of referral, most students are either out of education completely, or are accessing a significantly reduced provision, at a level below statutory requirements. Many students are referred with undiagnosed SEND needs, in addition to their mental health concerns. A vital part of the role of JPC is in unpicking these SEND needs, once the young person's mental health is adequately catered for.

JPC aims to respond to the changing needs of Wirral's children who cannot attend mainstream school for physical or mental health reasons by:

- Offering an alternative, therapeutic education setting, which is designed to be low-arousal and responsive to the individual needs of each student.
- Offering a bespoke curriculum offer, based on the mainstream model, but with the flexibility to respond to each students' academic and health requirements.
- Ensuring the greatest chance of success, both academically and socially, so that each student can return to a mainstream setting and achieve to their full potential.
- Working in a multi-agency way to overcome the health and social needs of each student in order to support them in removing the barriers that have previously prevented them from accessing education.
- Working closely with colleges and school sixth forms to provide a bespoke, enhanced transition package for all students, thus ensuring the greatest chance of remaining in education at post 16.

The number of referrals has grown in each of the last four years and JPC has been significantly oversubscribed in these years. At present, there are 92 students on roll – 15% over-subscribed. In addition, there has been a significant increase in referrals at KS3 in the last three years, with the current Y7/8 class being 60% over-subscribed – 13 students in a class of 8.

Changes in referral numbers over time

2013-14 = 65 referrals; 38 KS3 referrals; 44 admissions

2014-15⁽³⁾ = 46 referrals; 28 KS3 referrals; 10 admissions

2015-16 = 80 referrals; 49 KS3 referrals; 63 admissions

2016-17 = 83 referrals; 57 KS3 referrals; 61 admissions

In addition to the above, although Joseph Paxton Campus has a nominal roll of 80, and has funding based on this amount, since the last funding review its actual number of students has always been above this figure, often significantly so, as outlined below:

Number of students on roll prior to Y11 students leaving*

2013-14 = 98

2014-15 = 94

2015-16 = 85

2016-17 = 104

*Note: This number is not simply arrived at by adding the numbers of admissions to the number of students at the start of the year, due to the omission of students who have

returned to mainstream education; the actual number of students taught in each year is higher than the value above. This value is simply the number of students on roll shortly before the Y11 students sat their summer GCSE exams, when the school is typically at its greatest capacity.

Trends in numbers of referrals are even greater (as evidenced above) and, in 2016-17, the school was required to create a new class for KS3 as a result of the increase in numbers in this age range. This had a significant effect on Y10 students, who were forced to attend larger classes in order to staff the additional KS3 class. This resulted in a decrease in attendance for those Y10 students.

The increase in the number of referrals is part of a growing picture of the need for additional places in specialist SEMH provision for Wirral students, especially at a younger age range. This is evidenced by the fact that Joseph Paxton Campus started the 2017-18 year with 68 students, which is also part of a growing trend:

Number of students on roll in September:

2013-14 = 54

2014-15 = 78⁽³⁾

2015-16 = 56

2016-17 = 58

2017-18 = 68

⁽³⁾ The admissions process was carried out differently in the year 2014-15. The first admissions panel took place in early September, from which point JPC was oversubscribed and did not hold any further admissions panels until the following academic year. Therefore, numbers of referrals and admissions for this year are misleading.

The funding for the school through DSG has been from an overall cash amount of £1,359,000. This has changed little since 2012-13. Whilst bids have been made to the DfE to secure additional funding for the school's growing needs, these have been unsuccessful.

Previously, there has been some overlap in the funding of JPC and the LA's Home Education service. This is no longer the case and together with the oversubscription to JPC, as described above, and increasing complexity of its intake, has left a shortfall in income that requires review.

A staffing restructure was undertaken in 2017 in order to provide a vital increase in frontline services and support to the students and families of JPC. This resulted in a significant reduction in expenditure at SLT level, but has been unable to provide the savings required to allow JPC to continue to operate at its present level of support.

The School Structure

Teaching staff – JPC offers a full curriculum to KS3, with KS4 options being chosen by the students. Teaching costs are minimised by ensuring that all teaching staff are fully allocated lesson time in accordance with the STPCD; there is no slack in the teaching timetable.

SLT – As part of the restructure in 2017, the senior leadership team was reduced from its previous highest level of:

Headteacher; Deputy Headteacher; 2 Assistant Headteacher; Senior Teacher

To a much reduced team of:

Headteacher; Deputy Headteacher; Assistant Headteacher

Student Support – JPC has invested heavily in this area of staffing, in order to cater for the increased cohort size and the increasingly complex health and social needs of its students and their families.

Prior to the staffing restructure in 2017, the support team included:

SENCO; Assistant SENCO; Safeguarding & Family support Lead; 2 Learning Mentors; 2 HLTAs; 5 TAs

As a result of savings at SLT, the school support structure has been increased to:

SENCO; 2 Assistant SENCOs (one temporary); Safeguarding & Family support Lead; 4 Learning Mentors; 1 HLTA; 5 TAs

The two new Learning Mentors have specific roles that reflect the growing complexity of JPC’s cohort – one for attendance and one for alternative education.

In addition to the above, JPC has invested in an external Speech and Language consultant, who has been instrumental in developing the school’s knowledge of the link between language disorders/delay and young people’s mental health. The investment in this SALT was also instrumental in JPC assisting the LA in winning two high-profile EHCP tribunal cases this academic year, at a total saving to the LA of over £120,000.

Outcomes for students

There are many measurable outcomes that highlight just how successful JPC is. However, one vital outcome that cannot be measured is in the lives of children that are saved as a result of the therapeutic setting offered to young people at a time of crisis. Parent surveys carried out by the school are unanimously positive, with parents directly attributing the move to JPC as a major factor in removing their child’s risk of suicide.

In terms of academic success, JPC far outstrips its national comparitors and has done for several years:

GCSE Performance over time

| Data | JPC 2015 | National HS and PRUs 2015 | JPC 2016 | National HS and PRUs 2016 | JPC 2017 |
|-------------------|----------|---------------------------|----------|---------------------------|----------|
| A*-G / 9-1 | 100% | 58% | 96% | 59% | 100% |
| 5A*-C / 9-4 | 25% | 2% | 38% | NA | 37% |
| 5A*-G / 9-1 | 91% | 13% | 81% | NA | 96% |
| 5A*-C / 9-4 (E+M) | 16% | 1% | 31% | NA | 26% |
| A*-C / 9-4 Eng | 37% | | 50% | NA | 48% |
| A*-G / 9-1 Eng | 100% | 21% | 92% | 20% | 96% |
| A*-C / 9-4 Maths | 34% | | 42% | NA | 44% |
| A*-G / 9-1 Maths | 97% | 58% | 86% | 55% | 93% |
| Ave | | | 33 | 8.1 | 29 |

No directly comparable data is available for hospital schools for 2017 due to changes in the way the DfE are reporting GCSE results. However, in 2016/17, JPC students achieved an average Attainment 8 score of 29, compared with 6.3 for its nearest comparitors. 26% of its cohort achieved grade 4 or above in both English and Maths, compared with 4.4% for its nearest comparitors.

| | | | | | |
|-----------------------|--|--|--|--|--|
| Attainment 8 Score | | | | | |
|-----------------------|--|--|--|--|--|

Transition to post-16 education

September Guarantee:

2014 19/20 JPC students started their courses. 1 NEET = 5%

2015 34/36 JPC students started their courses. [11 different providers] 2 NEET = 5.5%

2016 28 / 28 JPC students started their courses. [10 different providers] 0 NEET = 0%

2017 37/38 JPC students started their courses. [10 different providers] 1 NEET = 2.6%

2016/2017 Wirral Average NEET = 5.3% National NEET = 6%

Funding

Unlike most special schools, JPC is not place funded. Therefore, all additional students, over and above the roll of 80, are unfunded.

The Local Authority receives funding directly from the DfE for hospital education based on historic levels of spend. This forms the bulk of JPC's income and has. A national review of hospital education and its associated funding is ongoing and when agreed is likely to result in a new National Formula. As yet, there is no agreed timescale for these changes although the Department recently collected Baseline data from all Local Authorities.

In addition to this block funding, JPC has two other income streams: Y11 Pupil Entitlement (AWPU) and Pupil Premium Grant.

The removal of the Home Education Service, along with ~~the significant, unfunded~~ oversubscription and the increasing complexity of needs, has left the school under-funded by £150,000 per year.

The only way to make savings of this magnitude would be to dramatically cut frontline support services for students. This would result in the school being unable to cater for its more complex students and unable to go over the roll number of 80.

The school has identified the students who have only succeeded (or are only currently succeeding) with significant additional support, over and above the level of funding currently received by the school, in addition to those who would not have been offered a placement if the school were to stick to its funded roll of 80. The alternatives for these students are either Home Education or an out of borough provision, both of which are far more costly, have reduced chance of successful transition to mainstream education at post-16, and are more likely to lead to further strain on adult services later down the line. The immediate costs to other services have been estimated to be in the region of £1 million.

WHS has, through the LA, previously applied directly to the DfE for additional funding. Unfortunately, due to the constraints on such applications for hospital education, the school was unable to make a successful case.

3. PROPOSAL

In order to make up a large proportion of this shortfall, it is proposed that after 1 term (12 weeks) of attendance at JPC, a contribution of £80 per week per student would be charged from the student's main school to the JPC budget. This is in line with charges made by other alternative provisions, most notably Home Education.

For the academic year 2017/18, this would have generated an additional £110,000.

With a number of other efficiencies, this allow the school to maintain most of its support structure for students and families. There is also an intention to seek additional funding nationally (from the next bidding round), in order to meet any remaining shortfall.

RECOMMENDATIONS

- 1. That the Forum note the report and the introduction of proposed charges to schools at the rate described above.**

Phill Arrowsmith

Headteacher Wirral Hospital Schools

WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM 4th JULY 2018

REPORT OF THE CORPORATE DIRECTOR FOR CHILDREN

School Budgets and Indicative Deficits Balances

EXECUTIVE SUMMARY

This report updates the Forum on the latest financial information received in respect of maintained schools budgets after budget setting.

1. Background

There are ongoing cost pressures in schools arising from pay awards, other inflationary pressures and changes in pupil numbers. School budgets have been held at flat cash for a number of years, however, there has been a small increase in funding for 2018-19, to offset some of these costs.

2. Monitoring School Balances 2018-19 and 2019-20

Schools must set their budgets by 30th June. 64 out of 103 budgets have been finalised at the point of writing this report. So far, this indicates that at the end of March 2019 balances will be £3.5m, which becomes a deficit of £0.5m by March 2020. There are 22 schools with provisional deficits in 2019-20 (21 this time last year) increasing to 46 by March 2021.

There are continuing difficulties for schools over the medium term, but we will report back in September when all the schools budgets have been finalised and we have a clearer view of the situation.

3. Action Taken to Date

- During the spring term letters have been sent to a number of schools with expected deficit budgets in 2018 and 2019 to request details. There have in addition been meetings with some schools and governors.
- Where schools are reviewing staffing levels this is in a number of cases leading to consideration of redundancies.
- A Notice of Concern is in place at 5 schools.
- There are 3 schools working their way through agreed licenced deficit plans, with a further 2 schools in the process of requesting a licenced deficit.
- LMS and HR continue to work with schools to balance budgets and plan any reduction in staff numbers or hours.
- Briefings and discussions with headteachers and school finance staff.
- School Bursar support working with Headteacher and governors to provide more detailed projections.

4. Future Action

- Use the Analytical tool, described in the May meeting, provided by the EFA in conjunction with our budget monitoring review at P6 and period 9 to ensure schools financial plans are sustainable.
- Contact schools with projected deficits in 2019-20 to discuss plans.
- 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 the Forum notes the report.
2. That schools balances continue to be monitored.

**WIRRAL SCHOOLS FORUM – 4th July 2018
WORK PLAN**

| Meeting Date | September 2018 | November 2019 | January 2019 | May 2019 | July 2019 |
|-----------------------|---|--|--|---|--|
| | Elect chair & vice chair | | | | |
| Budget | Budget monitoring and Final DSG Update on School budgets/balances | | Budget Monitoring Schools Budget 2019-20 High Needs and Early Years changes De-delegation of budgets Update on School budgets/balances | Schools Budget update 2019-20 Schools Budget provisional outturn Update on School budgets/balances | School Balances and Reserves School Budget Monitoring |
| Consultation | 2019-20 National Funding Formula for Schools, High Needs and Early Years | Outcome of school funding formula consultation | | | 2019-20 School Funding Arrangements |
| DfE Regs & guidelines | DfE Operational Guide | | School Finance Regulations Schools Forum Structure (identifies voting rights) | | |
| Working Groups | School Formula High Needs Early Years | | School Formula High Needs Early Years | School Formula High Needs Early Years | School Formula High Needs (to include places and pilot schemes Early Years |
| Other | Forum Membership Combined budgets PFI budgets Other central budgets High needs funding & places Primary place planning Eligibility update Admissions Update Arrangements for Alternative Provision De-delegated services <ul style="list-style-type: none"> • Contingency • Special Staff Costs • Library Service • Insurance • Behaviour Support | | School Contracts MEAs Update Academy update Sensory Support Service Update | School Admissions Early Years Edsential Business Plan High Needs Funding arrangements Home Tuition Update | Energy update Wirral Traded Services Update Free School Meals Hospital School |

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