



Wirral Schools Forum

Date:	Tuesday, 29 June 2021
Time:	4.00 p.m.
Venue:	on Microsoft Teams - Online

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AGENDA

1. PROTOCOL FOR VIRTUAL MEETING

1. Protocols of the Virtual meeting

- This is a public meeting
- The meeting is recorded for minute taking purposes only
- Remain on mute unless requested to speak
- Raise 'hand' to ask a question, or ask a question in the chat section
- Use Chat to vote as not everyone has the hand symbol.

2. MINUTES OF THE MEETING HELD ON 11TH MAY 2021 (Pages 1 - 6)

3. MATTERS ARISING

4. LACES AND LAC PUPIL PREMIUM (Pages 7 - 10)

5. EARLY YEARS UPDATE (Pages 11 - 14)

6. FALLING ROLLS & GROWTH FUND 2021-22 (Pages 15 - 18)

7. SCHOOL OUTTURN UPDATE 2020-21 AND 2021-22 BUDGET UPDATE (Pages 19 - 24)

8. **SCHOOLS FORUM MEMBERSHIP UPDATE (Pages 25 - 28)**
9. **WORKPLAN (Pages 29 - 30)**
10. **ANY OTHER BUSINESS**

WIRRAL SCHOOLS' FORUM

11th May 2021

MINUTES

Present: Adrian Whiteley (Chair)

Schools Group

L Ayling	H Johnson
M Bellamy	J Merry
J Bush	E Morris
L Davidson	M Morris
G Edwards	Cllr Norbury
S Elliot	A Ramsden
G Fraser	J Weise
S Goodwin	R Wood
E Johnson (substitute)	

Non-Schools Group

S Davies	A Rycroft
N Prance	G Harris
S Ralph	

In Attendance:

S Ashley	Cllr Cannon
J Backhouse	T Ghosh
Cllr Clements	J Hudson
A Dollard	S Robinson
C Fenlon	C Thomson
K Frost	

Apologies:

D Spencer	S White
K Takashima	M Williams

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2. Minutes from the Meeting held on 19th January 2021

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

3. Matters Arising

There were no matters arising.

4. Home and Continuing Education Service (HCES) – Review of Charging Policy

Julie Hudson updated the Forum on this alternative provision provided to secondary schools for children who cannot attend school for physical or mental health reasons. Although the pandemic has led to fewer referrals more older pupils are receiving support from the service.

The following changes to the charging policy from April 2021 are required to offset the cost of the service, which overspent in 2020-21:-

- An increase of weekly charge from £80 to £125 (chargeable after first 12 weeks)
- The charge for Yr 11 pupils will remain the same, at the AWPU rate, but where these pupils trigger Pupil Premium, it is requested that schools also transfer this amount to the HCES.

Resolved

Forum noted the report and the increase in charges from 1st April 2021.

5. Early Years Working Group Update

Carol Fenlon briefed Forum on the recent discussions of the Early Years Working Group:-

- The request to carry forward, in principle, underspends in the following areas to 2021-22 financial year:-
 - Central costs of £62,087, due to vacant posts now filled.
 - Early Years Funding element of £182,963 for a number of identified activities to be carried out in 2021-22 (section 3.1)
 - Continue to ringfence Disability Access Fund (DAF) underspend of £45,350 to support discretionary application processes in 2021-22
- Promotion of the 2 year old offer is currently taking place as this sector is taking longer to return to pre-covid levels than the 3&4 year old offer.
- There is an increase in the number of children in need of additional support.
- An additional census in Summer 2021 will be used to calculate the 2021-22 Early Years Funding.

It was noted that there is a great deal of ongoing work within early years to support the increasing number of children with additional needs and SEND. The aim of the Early Years team is to focus on inclusion in mainstream settings, where more staff who have been upskilled to provide support.

Resolved

- Forum members agreed to carry forward underspend of £245,050, in principle, for central costs (section 2.2) and EY funding element (section 3.1)

- Forum members agreed to carry forward, protect and ringfence the DAF underspend of £45,350.
- The report was noted

6. De-delegation – School Improvement / Behaviour Support

This report was brought to this forum meeting to provide members with an update of services provided from the de-delegated funds for School Improvement and Behaviour Support and the impact of each service.

Anna Dollard provided Forum Members with a clear outline of the Inclusion Strategy Manager's (ISM) role funded through de-delegated Behaviour Support, particularly concerning support to schools where pupils are at risk from permanent exclusion. The ISM works with colleagues in schools to reduce the number of exclusions and to support an inclusive ethos in the borough. Early intervention processes have been put in place to ensure poor behaviour is identified and managed at an earlier stage. There has been collaboration with University of Chester to provide a package of support and training to Wirral Schools to support staff in the area of trauma and attachment.

James Backhouse briefed Forum on the School Improvement service. The statutory duties for school improvement and the staff required to carry out those duties are identified in the report, along with how funds should be used to support school Improvement in Maintained Schools provided through the de-delegated funding and the School Improvement Monitoring and Brokerage Grant. The De-delegated funds requested will be used to: -

- Co-ordinate further CDP for all maintained schools, for this and next academic year, as schools recover from Covid-19
- CDP support for maintained secondary schools in problem solving and maths.
- To support maintained schools in a requires improvement category to move into good or outstanding.

The intended impact would raise attainment in all maintained schools.

Moving forward a clear strategy will be provided for a Behaviour Support and School Improvement offer for maintained schools and how this can be accessed through de-delegated funds. Where academies want access to this service it will be chargeable as they receive this funding directly from the ESFA.

In addition, the service is liaising with school leaders in maintained schools to identify specific needs and support required from the effects of the pandemic. The staffing structures for both services will be reviewed to ensure it meets the needs of the schools.

De-delegated amounts identified in the De-delegation of School budgets Report from the January 2021 Schools Forum meeting:-

	Full 12 months	5/12th de-delegated	7/12th to be charged
Primary Behaviour Support	£107,483	£44,785	£62,698
Primary School Improvement	£122,908	£51,212	£71,696
Secondary Behaviour Support	£31,799	£13,250	£18,549
Secondary School Improvement	£26,690	£11,121	£15,569

If the Forum members agree to contribute the 7/12th of Behaviour Support and School Improvement, schools will be informed of their individual amounts before charges are made against their budgets.

Resolved

- Forum Primary representatives agreed to contribute to the remaining 7/12th funding from school budgets for:
 - Behaviour Support
 - School Improvement
- The Forum Secondary representative agreed to contribute to the remaining 7/12th funding from school budgets for:
 - Behaviour Support
 - School Improvement
- Forum noted the report.

7. DSG Management Plan

James Backhouse updated Forum on the progress of the Dedicated School Grant (DSG) Management Plan to date and how it will move forward. The Co-production part of the plan was delayed to ensure best channels of communication and participation, to be completed by 18th May.

The timetable included in

There is a table of dates within the report (included in Section 20) which highlights the steps of process, with a view to completing the action plan by 9th May.

Resolved

Forum noted the draft DSG Management Plan

8. Schools Budget Provisional Outturn 2020-21

Christine Thomson outlined the year end position for the 2020-21 Schools Budget which is still subject to audit and is therefore provisional.

There is an in year overspend of £414k, with an overall deficit balance of £1.678k to be carried forward to 2021-22 financial year. This is an improvement from the January prediction.

Resolved

Forum noted the report and views from members

9. School Budget Update 2021-22

Christine Thomson outlined the Schools Budget for 2021-22 highlighting the changes since the previous meeting:-

- Academy Recoupment has reduced the Individual Schools Budget and DSG by £112m.
- De-delegation has transferred £1.5m to de-delegated block
- Falling Rolls/Growth Fund of £152,900 has been established after the NFF for 2021-22 has been applied.
- Re-allocation of TPG & TPECG between HCES and Support for SEN.

These changes are identified in appendix 1 the report.

It was noted that the falling rolls/growth fund is significantly lower than last year. It was agreed that a paper should be tabled at the June meeting to review last year's criteria against the 2021-22 fund amount, with alternative applications to be provided for discussion.

Resolved

Forum noted the report

10. School Balances as at 31/03/2021 and Deficit Budgets Review

Sue Ashley confirmed that the school balances as at 31st March 2021 were £13.5m, an increase of £5.6m since last year.

The number of schools ending this financial year with a deficit has reduced from 21 in 2019-20 to 11 this year. The LA will continue to work with schools to reduce deficit balances.

Due to the significant increase in balances a summary of income and expenditure was provided to identify where the main changes had occurred since 2019-20. This identified where changes in income and expenditure were related to Covid, or due to other factors.

Resolved

Forum Noted the Report

11. Changes to Schools Forum Operational and Good Practice Guidance

A copy of the revised Schools Forum Operational and Good Practice Guidance in March 2021 was provided.

The only change to the document was to make a permanent provision to enable Schools Forum meetings to be held remotely.

Forum Members will be written to shortly for their views on how future meetings will be held. The outcome will be presented to the June Meeting.

Resolved

Forum noted the Report

12. Workplan

The workplan was provided for information.

Tuesday 29th June 2021

Dates for the new academic year will be provided at the next meeting

13. Any Other Business

There was no other business.

WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM June 2021

REPORT OF THE DIRECTOR OF CHILDREN, FAMILY AND EDUCATION

LACES and LAC Pupil Premium

1. EXECUTIVE SUMMARY

Local authorities have a duty under the Children Act 1989 to safeguard and promote the welfare of a child looked after by them. This includes a specific duty to promote the child's educational achievement, wherever they live or are educated. The authority must, therefore, give particular attention to the educational implications of any decision about the welfare of those children.

The Children and Families Act 2014 requires local authorities in England to appoint at least one person for the purpose of discharging the local authority's duty to promote the educational achievement of its looked after children. That person – the Virtual School Head (VSH) - must be an officer employed by the local authority or, where local authorities agree to collaborate or share the role, another local authority in England.

Directors of Children's Services (DCS) and Lead Members should be aware of the risks of identifying a VSH without creating sufficient Virtual School capacity to deliver the duties placed on the local authority by statute.

Looked-after children attract Pupil Premium Plus (PP+) funding. This is additional funding provided to help improve the attainment of looked-after children and close the attainment gap between them and their peers. Local authorities receive a PP+ grant allocation based on the number of children looked after for at least one day and aged 4 to 15 at 31 August, as recorded in the latest looked-after children data return. This funding currently stands at £2345 per pupil, per annum.

2. BACKGROUND - Wirral Virtual School

Also known as Looked After Children Education Services (**LACES**) and made up, in Wirral's case of Education Progress Officers (EPO's) who's responsibility it is to ensure that all children in care have a Personal Education Plan (PEP) which recognizes the child's strengths and areas for development and includes smart targets to enable the child to make accelerated progress through targeted use of funding.

Current staffing arrangements for LACES are as follows:

EPO	Time	Cohort	Number of children on caseload
Virtual Head	Full time	VSH	
Education Lead	Full time	Secondary	148
Education Progress Officer	Full time		164
Education Progress Officer	0.8	OOB	91
Education Progress Officer	Full time	Primary	147 (24 OOB)
Education Progress Officer	Full time		139 (21 OOB)
Education Progress Officer	Full time	Early Years	126

Previously, PP+ funding was distributed to schools upon production of a PEP on a termly basis. LACES were engaged in trying to get PEPs completed and on the system in order to distribute the funding accordingly.

The process has changed considerably over the past 2 years and EPO's now provide much more **support and challenge** to schools regarding improved educational outcomes for children in care of the local authority. The PEP process now includes a PEP in the first weeks of the academic year setting out how school will use additional funding to support accelerated progress, every school is visited by LACES during the Spring Term to discuss progress of each child and provide both support and challenge to ensure schools are prioritising the children and maintaining high aspirations towards academic and pastoral outcomes. There is a further plan in the Summer term to evaluate progress and consider support going forward.

Since 2018 financial year, LACES have 'top sliced' PP+ by £400 per child in order to support the most vulnerable children in times of crisis and also to strengthen the team and therefore the service provided. This has recently been reduced to £395 per child meaning that the schools receive £1950 per child in 2 allocations, £1000 in the Autumn term and £950 in the Summer term providing progress has been made to accelerate learning.

Table 1 identifies expected spending of Top Slice in the 2021/22 financial year

Money to be paid	
644 x 395 = 254,380	
Looked after call Attendance collection tool	£40,000.00
Resources for Teachers	£20,000.00
Alternative Provision – Utopia, NexGen, Cornerstones -	£50,000.00
Virtual school staffing	£67,000.00
Randstad Supply Agency for Tuition and Teacher support	£50,000.00
Rossall Boarding School	£10,000.00
Unallocated funds for unidentified needs	£17,380.00
Total £237,282	£254,380.00

The impact of the *new and improved LACES* has been:

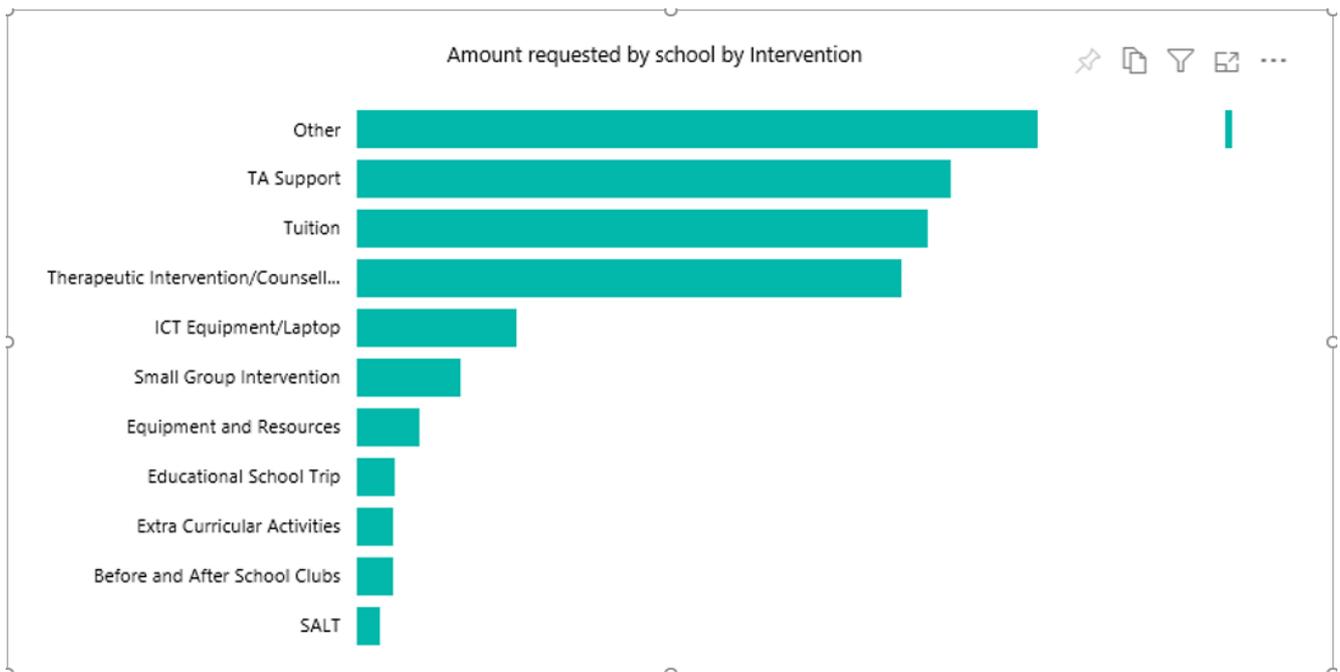
- 98% completion of PEPs
- 85% good or better quality
- There have been no children Permanently Excluded from school
- Every Wirral School visited and 90% of out of borough schools to develop relationships and provide support and challenge to raise aspirations and progress of looked after children
- Wirral children in care make better progress generally than their peers (most recent data) new reporting systems in progress will inform further regarding groups and percentages
- We have worked with colleagues in data teams to produce reports showing the educational progress of all Wirral CLA in GLD, Phonics, Key Stages 1, 2 and 4 assessment data. This allows us to see at a glance, who is making progress and to share good practice across the authority. It also allows us to identify those not making progress and to provide further support and challenge to school and settings.

3. LAC Pupil Premium Plus Funding

The number of statutory school age children in care in Wirral currently stands at 644 meaning that the total Government funding allocated last financial year stood at £2345 x 644 = £1,510,180 split as follows:

- Funding distributed to schools = £1950 x 644 = £1,255,800
Tables 1 indicates the many uses schools have put this to.
- Top Sliced Funding used by LACES = £395 x 644 = £254,380
The document below shows how this has been used. (table 2)

Table 2 Funding distributed to Schools:



Source: PowerBI

The chart shows that the biggest category is 'other'. This is because LACES use this section to record any gaps in the information provided by schools. Either they have not requested PP+ or there is a shortfall in the amount requested and the amount we are sending to school. Although there are marked improvements in the quality of PEPs overall, there is still room for improvement in how schools are completing the sections relating to use of PP+ and we have a training day planned to develop this.

RECOMMENDATIONS

1. Forum notes the Report
2. Forum recommends that further information is provided by schools as to how they are using PP+ particularly in relation to 'other'.
3. Further investigation of the impact of the spending of PP+

**WIRRAL COUNCIL
SCHOOLS FORUM 29th June 2021
REPORT OF THE CORPORATE DIRECTOR OF CHILDREN, FAMILIES AND
EDUCATION SERVICES
EARLY YEARS WORKING GROUP UPDATE**

1.0 EXECUTIVE SUMMARY

The purpose of this report is to update Wirral's School Forum of discussions at the recent Early Years working group, dated 7th June, inclusive of service updates.

2.0 Early Years Funding rates.

2.1 Earlier this year the Early Years Working Group requested information and an analysis as to the level 'headroom' in the previous year's budget that had been generated and whether this could have been applied to provider rates.

2.2 As background; the expenditure incurred is driven by both the provider rates, plus the level of activity (hours paid). It is difficult to accurately predict the level of financial resource available for provider rates at the beginning of each financial year as...

- The funding for Early Years is based on the January census across two calendar years e.g., for 2019-20, the grant allocation was based on 5/12 of the January 2019 census and 7/12 of the January 2020 census. However, activity is spread across all three terms thus there is an underlying assumption that January activity is representative of accumulation of all three terms.
- The take-up of the offer is still being established, particularly the extended 3-4-year-olds hours where take-up has been increasing.

Establishing some 'headroom' within the budget allows some capacity to fund these fluctuations in funding and financial commitment.

2.3 The following table compares the level of grant income received with expenditure incurred. An assessment has then been made as to what the impact would be on current and future years if provider rates had been increased to 'use' the underspends.

Table below shows what the impact would be on current and future years if provider rates had been increased.

Financial Year	Base Rate (3/4 Yr Olds)	Actual	Alternative		The analysis
		Variance Over/ (Under) spend £	Base Rate (3/4 Yr Olds)	Variance Over/ (Under) spend £	
2017-18	£3.60	(520,399)	£3.75	(21,413)	
2018-19	£3.68	(369,970)	£3.78	12,487	
2.4 2019-20	£3.68	(315,150)	£3.78	71,672	
2020-21 (Planned)	£3.76	0	£3.78	78,003	

identifies that there has been some capacity in prior years to pass over more of the grant income to providers. However, in setting hourly rates careful consideration needs to be given to the expected take-up of the hours in current and future years to ensure affordability in the current year and sustainability going forward.

2.5 The analysis also identifies that had an increase been made in the earlier years where % take up of funded places was lower and where the 30 hours extended offer had only just come online and the increase had been a year-on-year pass over, then the budget would have moved into a pressured position.

2.6 The Early Years working group had questioned whether moving forward, any in year underspends could be applied to the following years base rate, however this is not in line with Operational Guidance as it could create a fluctuation of rates depending upon take-up and thus would not be a guaranteed income.

2.7 To mitigate for this it is proposed for transparency of any potential underspends there is regular analysis with opportunity to identify and secure early any underspends, through the Schools Forum, to devolve out to the sector as “one offs” for the purpose of providing bespoke packages of interventions to meet the increased need of, specifically post Covid19 pandemic.

3.0. Take up of Universal 2, 3 + 4 early years free entitlements & 30 hours extended (EYFE).

3.1 The Local Authority is currently waiting for headcount submission to close for schools before we can finalise the actual take up figures, however it is felt that there will be a small increase and should continue to be above the national take up figures. The current rise in covid cases may have a detrimental effect on take up in the Autumn term, however there is planning underway to target and deliver outreach promotion to areas with the highest eligibility and lowest take up.

4.0 EYFE Funding Arrangements 2021/22

4.1 Wirral’s suggested school term dates for 21/22 do not coincide with early years funding weeks. Early years providers and schools are paid, 11 weeks in spring and 13 weeks in summer. The school term dates for 21/22 have 13 weeks in spring (1 weeks to cover the 5 teacher training days) and 12 weeks in summer. Early years providers and schools will need to determine their funding weeks to ensure children receive the correct entitlement of funding. Full guidance has been issued to early years providers and schools and frequently asked questions are being collated to send out in Autumn term. The business support manager is liaising with schools on future school year dates to discuss any further issues.

5.0. Project Plans for Potential Underspend of 2021/22.

5.1 The Quality Improvement & Training team are due to launch, 15th July 2021, **“Wirral’s Invitation to Play”** project. A community project to enhance parent /child attachment and promote communication and language (along with other areas of development). The first phase is in the Wallasey locality (Central Park) and will be a targeted intervention. In addition to funds being identified through the early years underspend, it has been funded by Children Centre Advisory Boards and Foundation Years Trust. The project consists of boards with activity prompts and information, positioned in areas, such as towns, parks, beaches to enhance children and family’s experiences.

5.2 A key focus of the early years underspend, should it be retained, will be on a programme of **“Recruitment and Retention”** for the early years workforce. What we know Nationally and Locally is, settings are struggling to fill vacancies due to shortage of interest and high numbers leaving the sector citing, **low pay, long hours, lack of progression and too many demands**, as a reason for career changes. This seems to be from managers through to newly qualified practitioners. Subsequently, the Early Years working group is keen to develop a long-term **Workforce Development Strategy** to “grow Wirral’s own”, that will ideally realise growth and sustainability for the sector.

6.0. Early Years SEND Updates

6.1 There continues to be an increasing pressure on the early years SEND team as the volume of requests for both funding, resources and support is relentless. The 3.5 FTE officers are currently supporting 300+ children in settings, inclusive of 172 children on transitions to schools, this has been their focus of work at present.

6.2 The May panel of Inclusive Practice Fund allocations was needed to be split across 3 dates with around 78 children presenting for that panel date, which is significantly higher than this time in previous years. There are currently 258 children in receipt of IPF, of which around a third will be moving into school in September, which is already pressuring the 21/22 budget. Should the rate of referrals continue as now, there will be a greater overspend on this fund in 21/22 as was in 20/21.

7.0 Service Updates;

7.1 Wirral’s Early Years Quality Improvement & Training team have now launched the Early Years On-line Platform **‘wirralequality.co.uk’** A one stop webpage for all information related to Wirral Early Years providers (local / national updates, CPD opportunities – e-learning and training sessions, downloadable resources etc). By the end of the second week of launching there were 100 registrations and 50 practitioners booked onto the first information sharing cluster. This new digital world of reaching out has proved invaluable throughout the Covid19 pandemic and no doubt will do beyond.

7.2 There is a new training programme set out on the Digital platform – targeting those areas of CPD most current to increase practitioners knowledge and skills. Recently this has included sessions focused on the new EYFS 2021 (200+ attendees), Curriculum, Assessment, Child Development, Outdoor Learning. Wellcomm training is every month with high numbers of attendees. The key focus of this term has been on transitions, working with settings and providing advice and resources to enhance the transition process to support children and families.

7.3 The Department for Education (DfE) Professional Development Programme Fund (PDPF) is now in phase 2 on Wirral. Tutor champions are in the process of training early years practitioners and completing their **Communication Friendly** setting accreditation. The mentor champions will start to deliver their training to enable all early years practitioners to become accredited communication friendly settings. Whilst face to face training has been halted to the COVID pandemic, virtual training is being delivered and is going well. Practitioners can put their learning into practice and have shared the impact this is having both on children in their setting, their practice, and the practice of their colleagues as they share hints and tips. Any remaining budget for the programme will be spent on increasing the number of early years practitioners receiving the training and the number of accredited settings with communication friendly status.

8.0 RECOMMENDATIONS

8.3 Forum to note the report.

Simone White – Director of Children, Families and Education

WIRRAL COUNCIL

SCHOOLS FORUM – 29th JUNE 2021

REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

2021-22 FALLING ROLLS AND GROWTH FUND

1.0 EXECUTIVE SUMMARY

- 1.1 The purpose of this report is to review the basis on which the falling rolls and growth fund is currently distributed along with possible alternatives to revise the distribution criteria for 2021-22.

2.0 BACKGROUND

Following consideration by Schools Forum at the June, September and November 2021 meetings, the criteria for distributing the falling rolls and growth fund was agreed as...

- the growth and falling rolls fund would be one fund, and
- allocation of the fund will be based on 3-year pupil number changes (not percentage growth or fall),

- 2.1 Application of this criteria for 2020-21 resulted in 23 schools benefiting from the distribution of the fund totaling £466k. A detailed analysis of the distribution was reported at the January 2021 Schools Forum meeting.

- 2.2 At the May 2021 meeting of the Schools Forum, it was reported that the value of the falling rolls and growth fund for 2021-22 is £152,936 which is significantly less than the value of the 2020-21 fund. The value of the fund is currently determined by the 'headroom' in the Schools Block allocation of the Dedicated Schools Grant (DSG) after the funding formula has been applied. Following consultation with schools in October 2021, it was agreed that the 2021-22 funding formula would include a +1.25% minimum funding guarantee to secure the widest possible distribution of the allocation directly to schools thus limiting the 'headroom' for 2021-22. Education Skills and Funding Agency (ESFA) regulations do allow for distribution to exceed the value of the fund but overspends will form part of the overall DSG surplus or deficit balance.

3.0 DISTRIBUTION OF THE 2021-22 FUND

- 3.1 Given the significant reduction in the value of the falling rolls and growth fund for 2021-22, Schools Forum requested at the May 2021 meeting that a review of the outcome of applying the existing criteria be undertaken before any funding was distributed. In addition, Forum requested that Wirral officers prepare alternative bases for distribution of the fund for consideration at the June 2021 meeting.

3.2 Several potential criteria for allocation of the 2021-22 fund have been identified and these are listed below. Appendix A summarises the outcome of applying the different criteria listed below along with any assumptions/factors that have been applied in determining the source data.

- Option A - application of the existing criteria
- Option B - option A but where the cumulative % change is 10% or more.
- Option C - falling rolls as per option A. Growth based on one year change in number of pupils i.e., 2020-21 v 2021-22.
- Option D – option C but where financial award is not less than £3,500.
- Option E – option C but where the growth reflects a change of 5% or more for Primary Schools and 2.5% for Secondary Schools.

3.3 The features, advantages and disadvantages of each option are summarised below:

	Features	Advantages	Disadvantages
A	Takes account of consistent 3-year change.	Consistent application across years.	Financial awards relatively small due to size of fund and growth in number of recipients thus impact may not be effective in each school.
B	Takes account of consistent 3-year significant change.	Financial award more meaningful value to support effective use.	Limit to number of schools that benefit.
C	Takes account of consistent 3-year change for falling rolls and one year change growth.	Focus on continuing falling rolls and new growth. Maximises distribution across schools	Financial awards relatively small in some cases due to size of fund and growth in number of recipients thus impact may not be effective in each school. Does not take account of on-going growth impact.
D	As per option C but with minimum funding level.	Focus on continuing falling rolls and new growth. Maximises distribution across schools whilst providing a meaningful financial award.	Application exceeds fund thus overspend will form part of the overall DSG surplus or deficit balance. Does not take account of on-going growth impact.
E	As per option C where growth change is significant.	Focus on continuing falling rolls and new significant growth. Financial awards meaningful to ensure effective use of overall funding.	Limit to the number of schools that will benefit. Does not take account of on-going growth impact.

- 3.4 Option B is felt to be the most appropriate basis for allocation of the fund as it provides consistency with previously agreed criteria whilst providing useful individual allocations that support their effective use within the confines of a limited fund.

4.0 FUTURE FOCUS

- 4.1 The basis for allocating the 2020-21 falling rolls and growth fund and the proposals for distribution of the 2021-22 focus on overall cumulative/year-on-year changes with little consideration of the factors that drive the changes.
- 4.2 Further development of the distribution basis is planned to capture external factors such as demographic changes and to target support where disadvantage is beyond the control of schools. Proposals for the future criteria and basis for determining the size of the fund will be presented to the September meeting of the Forum.

5.0 RECOMMENDATIONS

- 5.1 That Schools Forum adopt Option B as the basis for distributing the 2021-22 Falling Rolls and Growth Fund as this option aims to target the significant impact of falling rolls and growth whilst allocating funding on a basis to support its effective use.
- 5.2 That the Forum notes the development plans set out in section 4.0.

Simone White
Director of Children, Families and Education

Appendix A

Ref	2021-22					Falling Rolls = 3 year consistent change. Growth = 2021-22 increase where the increase reflects a change of 5% or more for Primary and 2.5% or more for Secondary
	Falling Rolls/ Growth Fund	Distribution based on existing criteria	3 Yr. consistent growth or fall where cumulative change is based on an impact of 10% or more	Falling Rolls = 3 year consistent change. Growth = 2021-22 increase	Falling Rolls = 3 year consistent change. Growth = 2021-22 increase (minimum award of £3,500)	
	Option A £	Option B £	Option C £	Option D £	Option E £	
A001	G	1,748		1,146	3,500	
A002	G			1,718	3,500	
A005	F	3,788	11,612	7,446	7,446	12,050
A006	G	7,091		3,628	3,628	
A007	G	13,429	14,934	5,346	5,346	8,651
A009	G			955	3,500	
A010	G			1,527	3,500	
A011	G	777		764	3,500	
A012	F	874		1,718	3,500	2,781
A014	G	14,765	9,386	5,919	5,919	9,578
A015	F	3,108	14,470	6,110	6,110	9,887
A016	G			191	3,500	
A017	G			955	3,500	
A018	G			955	3,500	
A019	G	8,062		5,537	5,537	8,960
A022	G			1,337	3,500	
A023	G			2,291	3,500	3,708
A029	G	874		764	3,500	
A030	F	2,526		4,964	4,964	8,033
A031	G			1,527	3,500	
A032	G			764	3,500	
A033	G			1,527	3,500	
A034	G	3,206	6,281	2,864	3,500	
A035	G			4,010	4,010	6,488
A036	G	3,699		3,246	3,500	
A037	G			382	3,500	
A040	G			2,482	3,500	
A043	G			382	3,500	
A045	F	583		1,146	3,500	1,854
A050	F	2,331	9,253	4,582	4,582	7,415
A051	G			1,909	3,500	
A055	F	1,360		2,673	3,500	4,325
A058	F	1,263		2,482	3,500	4,017
A060	G	14,182	13,677	9,356	9,356	15,139
A062	G	1,943		2,291	3,500	
A063	G			2,482	3,500	
A066	G	12,029	10,683	10,501	10,501	16,993
A067	G	3,886	13,592	1,146	3,500	
A072	G	7,577	6,479	1,146	3,500	
A073	F	1,943		3,819	3,819	6,179
A077	G	5,925		1,527	3,500	
A079	G			5,728	5,728	
A081	F	680		1,337	3,500	2,163
A082	G			955	3,500	
A084	F	3,011	8,552	5,919	5,919	9,578
A086	G			1,527	3,500	
A088	F	1,457	7,777	2,864	3,500	4,634
A089	F	971		1,909	3,500	3,090
A092	G	13,923	10,569	3,246	3,500	
A093	G	15,923	15,671	4,582	4,582	7,415
A094	G			1,146	3,500	
A095	G			573	3,500	
A097	G			764	3,500	
A099	G			3,628	3,628	
A107	G			955	3,500	
A111	G			382	3,500	
		152,936	152,936	152,936	234,574	152,936

Assumptions/Factors applied:

- Growth relates to pre-16 pupil numbers to meet basic need.
- Falling rolls support is available only for schools with a good or outstanding Ofsted inspection.
- Pupil numbers used in calculations are those presented in each October census.

WIRRAL COUNCIL

SCHOOLS FORUM – 29th JUNE 2021

REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

SCHOOLS BUDGET OUTTURN REPORT 2020-21 UPDATE AND 2021-22 BUDGET VARIATIONS

1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to provide an update on the year end position for the 2020-21 schools budget and an overview of the anticipated variations for the current year 2021-22 schools budget.

2.0 2020-21 SCHOOLS BUDGET

2.1 At the May 2021 meeting, Schools Forum were advised that the Schools Budget was overspent by £414k. This position is provisional pending the completion of the annual audit process.

2.2 The 2020-21 outturn report identified that, compared to grant, Early Years activity was underspent by £290.4k. It was agreed by Forum that, subject to final confirmation of the 2020-21 Early Years grant allocation by Education and Skills Funding Agency (ESFA), the underspend would be ring-fenced for use on Early Years activity in future years. To date final confirmation of the grant allocation has not yet been received.

2.3 Given that the next meeting of the Schools Forum will not occur until September, the final grant allocation for Early Years and the impact of any change will be notified to members by e-mail as soon as it is available.

3.0 2021-22 SCHOOLS BUDGET

3.1 Overall the schools budget is forecast to overspend by £1.148m which is mainly due to pressure in the High Needs Block. The table below summaries the outturn position by funding block and a more detailed analysis is attached in Appendix 1.

	2021-22 Budget £	2021-22 Forecast £	2021-22 Variation Under/-Over spend £
Schools Block	117,101,553	117,101,553	0
Schools Block de-delegated	1,559,500	1,559,500	0
Central School Services Block	3,612,932	3,576,660	36,272
High Needs	43,874,132	44,876,750	-1,002,618
Early Years	21,644,246	21,820,275	-176,029
DSG Income	-189,015,997	-189,010,164	-5,833
Total before contribution to/-from Reserve	-1,223,634	-75,427	-1,148,207
Movement in DSG Reserve	2,683,134	1,534,927	1,148,207
Total after contribution to/-from Reserve	1,459,500	1,459,500	0

- 3.2 The 2020-21 financial year closed with a Dedicated Schools Grant (DSG) reserve cumulative deficit position of £1.7m. It had been expected that the 2021-22 in-year position would deliver a positive contribution to the reserve of £2.7m from the High Needs Block thus generating a cumulative surplus reserve balance of around £1m. The current forecast outturn position means that the year-end contribution to reserve will be reduced from £2.7m to £1.5m thus delivering a cumulative £0.2m deficit position at the end of 2021-22.

4.0 REVISED 2021-22 BUDGET

- 4.1 There has been one change to the budget since that reported to Forum at the May 2021 meeting. A re-alignment of Teachers Pay/Pension costs of £40.8k between Special Schools and Support for SEN has been made to reflect updated data.

5.0 2021-22 FORECAST BUDGET VARIATIONS

The budget variations that make up the £1.148m overspend are identified in the table attached in Appendix 1. The reasons for the variations as well as comments on specific budget areas are given below.

5.1 Special Schools £449k favourable

The budget includes additional places to address demand, and these will be allocated via a commissioning process. It is not expected that the additional places will be fully allocated during the year and that there will be a part-year effect in financial year 2021- 22 for those that are allocated.

5.2 SEN Bases £18k adverse

The budget reflects a planned reduction of 5 places. The actual phasing of the reduction is not in line with expectations resulting in placement costs being £18k higher than budget.

5.3 Early Years £176k adverse

The forecast position assumes that the take-up of 2- and 3–4-year-old provision will be in line with planned activity. The position will be monitored during the year as more information becomes available. The in-year overspend relates to the Disability Access Fund ring-fenced funding which was b/fwd. from 2019-20 and which has been spent in 2021-22. The overspend is off-set using the DSG reserve. The forecast position does not include use of the proposed overall ring-fenced funding of £290k b/fwd. from 2020-21 as this is still subject to confirmation.

5.4 Central School Costs £36k favourable

The favourable position is due to:

- Admissions - £20k favourable due to part-time vacancies.
- School redundancy costs - £6k favourable. This budget relates to closed schools thus, based on existing commitments, costs should be reducing over time.
- Schools Forum - £3k favourable. Although there is no formal spend plan for this budget at this time, it is expected that a return to face to face meetings later in the year will incur meeting related costs.
- Contingency - £8k favourable. No potential calls on this contingency have been identified at this time.

5.5 Special Education Needs - Additional resources £1.5m adverse

Demand on this budget is expected to grow in line with the requests for EHCP assessments. Requests increased by around 75 between 2019-20 and 2020-21 and it is expected that growth will continue at a similar rate for 2021-22. 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 this will result in an overspend of £854k for Primary school pupils and £688k for Secondary school pupils.

The position will be monitored closely, and the forecast position re-assessed as more up-to-date information becomes available.

5.6 Special Education Needs – Top Ups £96k favourable

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	8,773,746	8,584,697	189,049
Top-Ups for Resourced Provision	1,070,200	1,105,200	-35,000
Alternative Provision	1,318,200	1,304,334	13,866
FE & 6th Form Top-Ups	2,050,000	2,050,000	0
Additional Nursing Support	160,000	160,000	-0
Exceptional Needs	1,350,000	1,421,519	-71,519
Total	14,722,146	14,625,750	96,396

The underspend of £189k for maintained Special Schools relates to the Top-Ups associated with the additional places that have been included in the 2021-22 budget and discussed in 5.1 above. As the additional places will not be fully allocated and those that are will only have a part year effect in 2021-22, the top-up budget associated with them will also remain under utilised.

The overspend of £35k for the resourced provision relates mainly to the planned reduction in base places. The reduction in places will not occur as soon as expected thus the related top-up costs have been forecast on a full-year basis.

The underspend of £14k for the alternative provision relates to a change in pupil activity.

The budget for Exceptional Needs is forecast to overspend by £72k despite an increase of £568k from 2020-21. The overspend is due to continuing demand for support and will be closely monitored during the year.

5.7 Independent Special Schools £13k adverse

The overspend relates to a change in pupil activity. Whilst this is a relatively small variance against a £5.1m budget, this budget was significantly overspent in 2020-21 and has been increased by £986k for 2021-22. This activity will be closely monitored during the year.

5.8 Support for SEN £25k favourable

There are several activities and services that are delivered by this budget

including Hearing and Vision, Communication Differences, Vulnerable Children and Physical/Medical Impairment. A significant portion of the overall budget relates to staff costs and the main reason the favourable variance is due to short-term vacancies.

5.9 Dedicated Schools Grant £6k adverse

The adverse variance relates to an expected reduction to the DSG allocation relating to an alternative provision out of borough placement. The change to the allocation has only recently been communicated by ESFA.

6.0 UPDATE ON SPECIFIC RESERVES

6.1 The opening reserves position for 2021-22 reflects a cumulative deficit position of £1.679m. The analysis of this reserve is as follows:

	£000
Gross deficit	-2,146.5
Ring-fenced reserves	
Early Years Disability Access Fund	222.5
Early Years Unspent 2020-21 grant (subject to confirmation of final 2020-21 grant)	245.1
Net deficit	-1,678.9

6.2 The 2021-22 budget includes a planned surplus of £2,683k in the High Needs Block that was to be carried forward into the reserve at the end of the financial year. Due to the overspend of £1,148k that has been forecast, the amount available to contribute to reserve will reduce to £1.535m. The £1.679m opening deficit position will be partially off-set by the forecast £1.535m contribution to reserve leaving a closing deficit position of £144k.

7.0 RECOMMENDATIONS

7.1 That the Forum notes the report and the forecast financial position of the Schools Budget for 2021-22.

7.2 That the Forum notes the action in section 2.0 to communicate the 2020-21 final Early Years grant allocation and the impact of any changes to members by e-mail.

Simone White

Director of Children, Families and Education

Appendix 1 - Budget Variations 2021-22

	2021-22 Budget £	2021-22 Forecast £	2021-22 Variation Under/-Over spend £
Individual Schools Budget			
Primary	96,052,551	96,052,551	0
Secondary	20,896,066	20,896,066	0
Special	12,590,592	12,141,425	449,167
Wirral Hospitals School	1,407,180	1,407,180	0
SEN Bases	969,731	988,000	-18,269
Sixth Form/Further Education	36,000	36,000	0
Early Years	20,675,546	20,851,575	-176,029
Growth and Falling Rolls Fund	152,936	152,936	0
Individual Schools Budget Total	152,780,602	152,525,733	254,869
Central School Costs			
Early Years Costs	518,700	518,700	0
Admissions	379,981	359,909	20,071
School Redundancy Costs	81,000	75,000	6,000
Licenses and subscriptions	243,751	243,751	0
Schools Forum	10,600	8,000	2,600
Contingency	7,600	0	7,600
Contribution to combined budgets	700,500	700,500	0
PFI Affordability Gap	1,459,500	1,459,500	0
Retained duties Central (ex-ESG)	730,000	730,000	0
Costs delegated to/de-delegated from schools			
Library Service	185,100	185,100	0
Insurances	25,100	25,100	0
School Specific contingencies	31,100	31,100	0
Special Staff Costs	696,000	696,000	0
Behaviour Support	58,000	58,000	0
School Improvement	62,300	62,300	0
Retained duties de-delegated (ex-ESG)	501,900	501,900	0
High Needs Pupils			
Additional resources	6,528,300	8,070,462	-1,542,162
SEN top-ups	14,722,146	14,625,750	96,396
High Needs contingency	400,000	400,000	0
Independent Special Schools	5,120,000	5,132,545	-12,545
Home Tuition	422,730	422,730	0
Support for SEN	2,069,253	2,044,458	24,795
Special School Transport	58,200	58,200	0
Non-delegated school costs Total	35,011,761	36,409,004	-1,397,243
Total Costs	187,792,363	188,934,737	-1,142,374
Funding			
Dedicated School Grant	-189,015,997	-189,010,164	-5,833
Total before Movement in DSG Reserve	-1,223,634	-75,427	-1,148,207
Contribution to/-from DSG Reserve	2,683,134	1,534,927	1,148,207
Grand Total	1,459,500	1,459,500	0

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WIRRAL COUNCIL

WIRRAL SCHOOLS' FORUM 29th June 2021

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.

		2017-2021	2018-2022	2019-2023	2020-2024	2021-2025	Total
Total Membership							
5	Primary Headteachers		1	1	3		5
4	Primary Governors	1	1	1		1	4
1	Secondary Headteachers				1		1
1	Special Headteacher		1				1
1	Special Governors		1				1
1	Nursery Representative				1		1
13	Total Schools Membership						
9	Academy Representative	3	1	2		1	7
9	Total Academy Membership						
1	Non-teacher representative					1	1
1	Teacher representative			1			1
1	Catholic Diocese		1				1
1	Church of England Diocese					1	1
1	Further Education	1					1
3	PVI Early Years Providers			1		2	3
8	Total Non-Schools Membership						
30	Total Membership	5	6	6	5	6	28

1.3 There are currently 2 Academy vacancies, with one temporarily being filled by Lisa Ayling, until volunteers come forward. There are also 2 academy members whose term of office is due to end in August and a further one due to end in November. A request for Academy representatives has recently been sent out to all academies.

1.4 There is a vacancy for a primary governor representative. A request has recently been sent out to request applications.

1.5 New Members

There have been two new members since the January report, as follows:-

Moira Loftus – Academy Representative fills a vacancy. Although academy reps are not phase specific Moira provides representation for Wirral's Primary Academy schools

Gill Harris – Non-teacher representative replaces Steve Bennett

Brian McGregor – Church of England Diocese Representative Replaces Greg Edwards

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

1.5 Membership Changes

Regulations governing the forum requires school/academy membership to take account of pupil weighting. Although one primary school, Brackenwood Junior, converted to Academy on 1st January 2021 this does not affect the current school/academy split.

Current		Pupil no's Jan 21 Census	Expected	
9	Primary	21717	45.2%	9
1	Secondary	3643	7.6%	1
9	Academy	22635	47.2%	9
19.0		47995	100.0%	19

2.0 Recommendations

2.1 Forum notes the report.

Simone White
Director of Children, Families and Education

Appendix 1

Group	Name	Category of Membership	SCHOOL /establishment	Term of Office	
Schools	Andy Ramsden	Primary Headteacher (Birkenhead S)	Oxton St Saviours	Sep-20	Aug-24
Schools	Steve Elliot	Primary Headteacher (Birkenhead N)	Overchurch Infants	Nov-20	Oct-24
Schools	Emily Morris	Primary Headteacher (Wallasey)	Eastway Primary	Oct-19	Sep-23
Schools	Kate Takashima	Primary Headteacher (Deeside)	West Kirby Primary	Sep-20	Aug-24
Schools	Liz Davidson	Primary Headteacher (Beb/Brom)	Brookhurst	Jul-18	Jun-22
Schools	Dave Spencer	Primary Governor	Pensby Primary	Jul-17	Jun-21
Schools	Roy Wood	Primary Governor	Hillside Primary	Oct-18	Sep-22
Schools	Julie Merry	Primary Governor	Overchurch Infants/Cathcart	Jan-21	Dec-24
Schools	Clr Tony Norbury	Primary Governor	Prenton Primary	Sep-19	Aug-23
Schools	Simon Goodwin	Secondary Headteacher	South Wirral High	Sep-20	Aug-24
Schools	Margaret Morris	Special Headteacher	Elleray Park	Sep-18	Aug-22
Schools	John Weise	Special Governor	Hayfield Primary	Dec-18	Nov-22
Schools	Cathy Hughes	Nursery Representative	Leasowe Early Years	Jun-20	May-24
Academy	Moira Loftus	Academy Rep	Townfield Primary	Jun-21	May-25
Academy	Adrian Whiteley	Academy Rep (Chair)	St Anselms	Aug-19	Jul-23
Academy	Helen Johnson	Academy Rep	The Birkenhead Park School	Sep-17	Aug-21
Academy	Vacancy	Academy Rep			
Academy	Mark Bellamy	Academy Rep	Hilbre High School	Sep-17	Aug-21
Academy	Andy Waller	Academy Rep	West Kirby Grammar School	May-18	Apr-22
Academy	Jon Bush	Academy Rep	Oldershaw Academy	Dec-17	Nov-21
Academy	Geraldine Fraser	Academy Rep	Prenton High School for Girls	Oct-19	Sep-23
Academy	Lisa Ayling (Temp)	Academy Rep	Prenton High School for Girls	Nov-19	
Non-Schools	Gill Harris	Non-teacher representative	Wirral Unison	May-21	Apr-25
Non-Schools	Anne Rycroft	Teacher representative	NASUWT	Aug-19	Jul-23
Non-Schools	Susan Ralph	Catholic Diocese	St Michaels & All Angels	Nov-18	Oct-22
Non-Schools	Brian McGregor	Church of England Diocese	Woochurch CE Primary	Jun-21	May-25
Non-Schools	Sue Higginson	16-19 Provider	Wirral Metropolitan College	Sep-17	Aug-21
Non-Schools	Nicky Prance	PVI Early Years Providers	Barnston Buddies	Jan-21	Dec-23
Non-Schools	Simon Davies	PVI Early Years Providers	Penguins Nurseries	Jan-21	Dec-23
Non-Schools	Ellie Longbone	PVI Early Years Providers	Stepping Stones	May-19	Apr-23

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WIRRAL SCHOOLS FORUM – 29th June 2021 WORK PLAN

Please note change in meetings. May & June meeting merged into 1 meeting in late May. With an optional meeting in March if late decisions are required

Meeting Date	28 th September 2021	23 rd November 2021	18 th January 2022	March 2022 Provisional meeting	31 st May 2022
Virtual / Physical					
	Elect chair & vice chair				
Budget	Budget monitoring 21-22 Q2 School Balances Update Growth & Falling Rolls Report if fund future process		Budget Monitoring 21-22 Q3 Schools Budget 22-23 De-delegation of budgets School Balances update Growth & Falling Rolls Fund		Provisional outturn 2021-22 Schools Budget 2022-23 School Balances update
Consultation	2022-23 National Funding Formula for Schools, High Needs and Early Years	National Funding Formula Update for 2022-23			2023-24 School Funding Arrangements if new info out
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	High Needs Early Years	School Formula High Needs Early Years	High Needs Early Years		High Needs Early Years
Other	Alternative Provision School Admissions Special School Places	De-delegated services <ul style="list-style-type: none"> Contingency Special Staff Costs Library Service Insurance Edsential Update School Improvement Behaviour Support	Wirral Traded Services Update Sensory Support Service Update Energy update Wirral		LACES /LAC PP Update Home Tuition Update

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