



## Wirral Schools Forum

<b>Date:</b>	<b>Tuesday, 22 November 2022</b>
<b>Time:</b>	<b>5.00 p.m.</b>
<b>Venue:</b>	<b>Wallasey Town Hall - Council Chamber</b>

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## AGENDA

1. WELCOME AND APOLOGIES
2. MINUTES OF THE MEETING HELD ON 6 OCTOBER 2022 (Pages 1 - 8)
3. MATTERS ARISING
4. ESENTIAL UPDATE (Pages 9 - 10)
5. HIGH NEEDS WORKING GROUP UPDATE (Pages 11 - 14)
6. DE-DELEGATED BUDGET FOR SCHOOL IMPROVEMENT SUPPORT AND BEHAVIOUR SUPPORT UPDATE (Pages 15 - 18)
7. WIRRAL SCHOOLS FORUM MEMBERSHIP (Pages 19 - 22)
8. DE-DELEGATED BUDGETS - CONTINGENCY, SPECIAL STAFF, AND INSURANCE COSTS (Pages 23 - 26)
9. SCHOOLS REVENUE FUNDING 2023-24 NATIONAL FUNDING FORMULA (Pages 27 - 30)
10. SCHOOL IMPROVEMENT MONITORING AND BROAKERAGE GRANT CONSULTATION OUTCOME (Pages 31 - 32)
11. SCHOOLS BUDGET VARIATIONS 2022-23 (Pages 33 - 38)
12. WORKPLAN (Pages 39 - 40)

**13. ANY OTHER BUSINESS**

## WIRRAL SCHOOLS FORUM

Thursday, 6 October 2022

**Present:** Adrian Whiteley (Chair)

### Schools Group

Lisa Ayling	Kathryn Kennedy
Mark Bellamy	Amanda Lamkin
John Bush	John McDonald
Geraldine Fraser	Margaret Morris
Simon Goodwin	Sue Ralph
Emma Johnson	John Weise (Vice-Chair)

### Non - Schools Group

Gill Harris
Nicky Prance
Joanne Proctor

### In Attendance

Sue Ashley	Kate Frost
James Backhouse	Sally Gibbs
Asako Brown	Sarah Harper
Cllr Chris Cooke	Sheila Robinson
Joe D'Henin (Clerk)	Frances Whiting
Michael Fitzsimmons	

## 1 **WELCOME AND PROTOCOL FOR VIRTUAL MEETING**

The Clerk introduced the meeting and welcomed members and attendees. Apologies had been received from Julie Merry, Helen Johnson, Andy Ramsden, Anna Turnbull, Jess Trigg, Moira Loftus, Geraldine Fraser, Cllr Helen Collinson and Simone White. Amanda Lamkin was deputising for Chris Mervyn. The Clerk set out the protocol for the meeting and expected conduct for virtual meetings.

## 2 **ELECTION OF CHAIR & VICE-CHAIR**

Before the meeting proceeded, the Clerk invited members of the Schools Forum to appoint a Chair and Vice-Chair for the next academic year. Adrian Whiteley was nominated by John Weise to be appointed as Chair. As no other nominations were forthcoming, Adrian Whiteley was appointed Chair unopposed.

John Weise was nominated by Adrian Whiteley to be appointed Vice-Chair. As no other nominations were forthcoming, John Weise was appointed Vice-Chair unopposed.

### **Resolved – That**

- 1. Adrian Whiteley be appointed Chair of the Wirral Schools Forum for the academic year 2022-23.**
- 2. John Weise be appointed Vice-Chair of the Wirral Schools Forum for the academic year 2022-23.**

### **3 MINUTES OF THE MEETING HELD ON 14TH JUNE 2022**

**Resolved - That the minutes of the meeting of Schools forum meeting held on 14 June 2022 be agreed as an accurate record.**

### **4 MATTERS ARISING**

No matters were raised.

### **5 SCHOOL ADMISSIONS**

Sally Gibbs presented to the Schools Forum an annual report outlining details of Mainstream School Admissions completed during the 2020-2021 Academic year. Members of the Forum were presented with figures in relation to the allocation of places in all primary and secondary schools by preference, and the number and outcomes of appeals. It was noted that the number of appeals and the outcomes of hearings were similar to previous years. The Forum were also provided with an outline of the updated Schools Admissions Code. This included changes to the following areas: In year transfers, Fair access protocol, Looked After Children, Published Admission Number. The Forum were also asked to note data presented relating to overseas applications and applications from refugees. The Forum were also informed of the overall School Admissions budget in 2022-23.

Members of the Forum queried the expanded definition of Children Looked After outside of England under the new admissions code, where it was clarified that the under the definition, the inclusion of children 'who are or appear to have been in a state of care outside of England and have been adopted' as Children Looked After, meant that in practical terms Local authorities were granted greater judgement on the evidence produced by parents for proof of adoption. Members also discussed the data relating to overseas applications and refugees, including the reasons behind why they was a far greater primary intake in the 'other' category than secondary intake, and the work being done to compare this data with local authorities on a city region level.

**Resolved – That the report be noted.**

**6 EARLY YEARS WORKING GROUP UPDATE**

Sarah Harper provided the Forum with an update on the work of the Early Years Working Group, including Early Years service and performance updates. An outline of the take up of early years free entitlements (EYFE) was provided, which was noted to be slightly below pre-pandemic levels. Work being done to address this was discussed. Members of the Forum were informed of childcare sufficiency statistics in the borough and a breakdown of number of providers by type of childcare was provided. It was noted that staffing issues remained, leading to a capping of places in some circumstances, but overall there appeared to be sufficient places available across the borough, although not necessarily to meet requests of parents for specific days/sessions.

Members queried the sufficiency of childcare provision during school holidays as an area the Local authority should be looking to address, and it was agreed that this would be explored further outside of the meeting, and would be discussed at the next meeting of the Early Years Working Group.

The Chair of the Forum also placed on record his thanks to Carol Fenlon, former early years head of service, who had recently left the authority.

**Resolved – That the report be noted.**

**7 WIRRAL SCHOOLS FORUM MEMBERSHIP**

Frances Whiting provided an update on the membership of the Schools Forum. An overview of the current membership by group was outlined. It was noted that there were currently 5 vacancies, 1 representative whose term of office came to an end in September and 1 whose term was due to expire by the end of the calendar year. Members were informed that expressions of interest had been sent out requesting nominations for all the current vacancies, with a deadline of 21st October 2022 for nominations to be received.

**Resolved – That the report be noted.**

**8 DEDICATED SCHOOLS GRANT (DSG) FUNDING FOR 2023-24 AND LOCAL FUNDING FORMULA CONSULTATION**

Asako Brown presented the Forum with an update on funding announcements for 2023-24, and the consultation process for mainstream Primary and Secondary schools. Provisional gross funding allocations for Wirral based on

pupil numbers in the October 2021 census were outlined, and it was noted that this would mean increased funding for Wirral overall.

The Forum were presented with an outline of Direct Funding Formula Department for Education (DFE) consultation which launched in July 2021, with the response published in March 22. The DFE confirmed that it was to move forward with its plans to implement a direct National Funding Formula (NFF), whereby funding would be allocated directly to schools based on a single national formula, without further adjustment through local formulae. The timeline for a transition to a direct NFF was set out. It was noted that Wirral had mirrored NFF for the past 4 years and that the proposal would have little or no negative impact on Wirral schools. Members were presented with detail on how the proposals would specifically impact the Schools Block, High Needs Block, and Central Services Block, including an outline of the schools block consultation for setting a minimum funding guarantee (MFG) in 2023-24.

Members queried several aspects of the report, including:

- The sustainability of the high needs block expenditure projections at 18.33% for 22-23.
- The impact of inflationary pressures and pay rises.
- The timeline for detail on Early years funding, where it was agreed that as soon as the information is received, an early year working group meeting would be scheduled to discuss.
- The binary decision between 0.0% and 0.5% for the setting of the MFG for 22-23.

It was agreed that the consultation would be circulated through the Wirral Association of Secondary Headteachers (WASH) and the primary and secondary school groups.

### **Resolved – That**

**1. The report be noted; and**

**2. Plans for the consultation process with schools be noted and the outcomes be reported to the November meeting of the Schools Forum.**

## **9 SCHOOL IMPROVEMENT, MONITORING AND BROKERAGE GRANT - REQUEST FOR CONSULTATION FOR DE-DELEGATION**

James Backhouse presented to the Forum proposals on the consultation process in respect of the de-delegation of funding to mitigate the reduction in the School Improvement, Monitoring and Brokerage Grant (SIMBG) funding received by Wirral Council. It was outlined how the grant was to be reduced by 50% in 2022-23, before being removed completely for 2023-24. To mitigate against the loss of funding, members were presented with models for the De-Delegation which were to go to consultation: a tiered funding model and a per

pupil model. The funding implications of each model were set out to members. A consultation would be sent out to schools on the 10th October 2022 with views being sought on their preferred model.

**Resolved – That**

**1. The report be noted; and**

**2. The plans for a consultation process with schools be noted and the outcomes be reported at the next Schools Forum meeting in November.**

10 **SCHOOLS BUDGET VARIATIONS 2022-23**

Asako Brown provided the Forum with an overview of the anticipated variations for the current year 2022-23 schools' budget. Members were informed that overall the schools budget was forecast to overspend by £1.904 million, an increase in the overspend figure report in June 22, and it was explained that this was largely down to pressures in the High Needs Block. A summary of the outturn position and reasons behind overspend by block was provided, including a detailed breakdown of variations within each block. In particular, the factors behind the overspend within the High Need Block were explained to the Forum: Additional units of resource funding required to address the increase in Education, Health and Care Plan (EHCP) assessments and clearing existing backlogs in assessments; and Cost of out of borough special school provision due to increases in demand.

Members expressed concern that current levels of overspend were unsustainable, whilst also stating concern at the number of SEN and EHCP cases being addressed by the independent sector. It was affirmed that the Forum believed each case needed to be examined and kept within Wirral schools.

It was agreed that a High Needs Working Group would be scheduled to meet before the next meeting of the Schools Forum, and that some anonymised EHCPs could be brought to the meeting for review.

**Resolved – That the report and the forecast financial position of the Schools Budget for 2022-23 be noted.**

11 **SCHOOL BALANCES UPDATE**

Sue Ashley provided the Forum with an update on the current and projected financial position for schools. It was noted that conditions remained challenging due to inflationary pressures. Members were provided with an outline of Actual Balances at March 22, Expected Balances at March 23, and Expected Balances at March 24, all of which were broken down by school category. Members were cautioned that the figures provided did not take into

consideration changes to pay award estimates since budget setting for support staff and teachers, as new settlements were being discussed.

It was noted that there were 3 schools with licenced deficits and agreed budget plans, with a further 3 schools who had moved back into a credit position this year. 4 schools were to be issued with a Notice of Concern. Members were pointed towards Table 2 of the report, showing the estimated number of schools in deficit for 2024.

A summary of the action taken to date was provided, alongside steps to be taken going forward.

The Forum noted the huge challenges balances will be placed under when new pay awards were taken into account, and it was agreed that updated information of the affect of pay awards would be reported at the next meeting of the Forum in November.

**Resolved – That**

- 1. The report be noted; and**
- 2. School budgets continue to be monitored.**

**12 GROWTH & FALLING ROLLS FUND**

Asako Brown presented a report proposing options relating to how the falling rolls and growth fund is distributed for 2022-23. As the value of the falling roll and growth fund for 2021-22 was significantly less than the value of the preceding year, to explore more effective use of the fund, several potential criteria for allocation were identified. The options contained within the report were presented to members. It was recommended to members of the Forum that Option B should be adopted as the basis for distributing the 2022-23 Falling Rolls and Growth Fund, as was chosen for 2021-22, as this option aimed to target the significant impact of falling rolls and growth whilst allocating funding on a basis to support its effective use.

**Resolved – That**

- 1. Option B be adopted as the basis for distributing the 2022-23 Falling Rolls and Growth Fund; and**
- 2. The future focus as set out in 4.0 of the report be noted.**

**13 WORKPLAN**

Members were provided with an overview of the Wirral School Forum's workplan for the next meetings.

**Resolved – That the workplan be noted.**

14 **ANY OTHER BUSINESS**

**Future Meetings**

The Chair proposed that the next meeting of the Schools Forum would meet in person. After a consensus was reached, it was resolved that the clerk would make arrangements for the next meeting to be held at Wallasey Town Hall, with an agreed start time of 5pm.

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## WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM: 22 November 2022

REPORT: MANAGING DIRECTOR, ESENTIAL COMMUNITY INTEREST COMPANY

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### 1. EXECUTIVE SUMMARY

Edsential has fulfilled its mission as a Community Interest Company during this difficult year. We have constantly adapted to schools' needs and safety requirements to be the sustainable, high quality partner that schools could rely on during these challenging times.

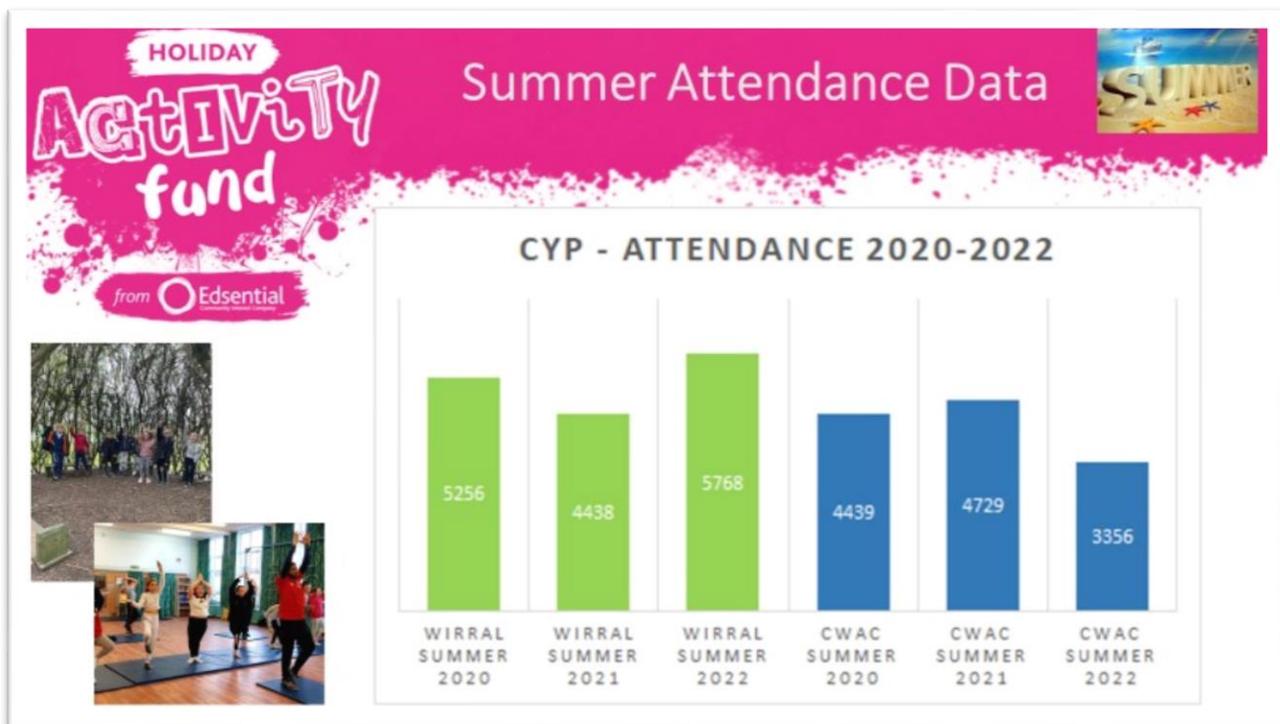
Please see our latest impact report: : (<https://www.youtube.com/watch?v=nrUh1-QceKM>)

### 2. BACKGROUND

Holiday Activity and Food programme coordination 2022

Edsential continued to coordinate the HAF programme for Wirral and CWAC.

Summer 2022:



The Winter HAF provision is currently recruiting settings for the Christmas period.

#### Service delivery

All services have continued to return to normal provision, post-covid, and highlights include:

Edsential Musical Routes worked with 243 schools to support or deliver music education programmes and activities across Wirral and Cheshire West & Chester. Our new

partnership with Futureyard in Birkenhead has provided opportunities for students to understand the career pathway into the music industry, whilst gaining relevant experience.



Our Culture team contributed to 3 [All-Party Parliamentary Group Inquiry Sessions](#) for Northern Culture. The aim of these sessions was to produce a bespoke 'State of the North' report on Northern Culture, providing a united voice on pan-Northern cultural asks and priorities in order to shape and influence future Government decision making and policy

Our catering service was invited to join the Foodservice working group of DEFRA's UK Sustainable Commodity Initiative. This recognizes our expertise in building a sustainable food supply chain with the aim of sharing this knowledge with the UK government for policy development.

Edsential Play Maker Award Programme. Over the last 12 months, we have helped to train over 140 young leaders within Primary schools from across the Wirral. 100% of PE subject Leaders said that activity levels of all children at break times had increased following the Play Maker training.

As with schools, safeguarding is a fundamental responsibility for our teams and this year:

- 639 Edsential staff have completed online safeguarding training
- 14 managers completed Safer Recruitment training through the NSPCC
- 20 managers completed Designated Safeguarding Lead Training

### Inflation

We are experiencing significant pressure due to inflation in food, staff, energy and transport costs; pressures we appreciate our school customers are also experiencing. We have taken difficult decisions to keep our cost increases significantly below inflation (between 3-5%), but the opportunity to continue to do so will be reduced next year as most cost saving opportunities will have been exhausted. However, given we are a social enterprise that reinvests all income to improve our services, we will continue to keep any price increases as low as possible.

On behalf of our near 1000 staff I would like to thank everyone who supported us during this year.

### **RECOMMENDATIONS**

The Schools Forum is recommended to note the report.

## WIRRAL COUNCIL

WIRRAL SCHOOLS FORUM 14<sup>th</sup> June 2022

### REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

#### High Needs Working Group Update

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#### 1. EXECUTIVE SUMMARY

The high needs working group has met on the 8<sup>th</sup> November 2022. The focus of the meetings has been to discuss the on-going pressure in relation to the high needs block, increased demand on special school places across the local area, the approach being taken to review IPFA funding and the DFE program Delivering Better Value.

#### 2.0 IPFA review update

2.1 The Assistant Director – Education shared the workstream 4 report from the SEND transformation board related to the IPFA review – forecasted £2.6m expenditure in 2022-2023.

2.2 The pilot project identified within the report was shared with the group – with an expected end date of April 2023. The pilot will also look at transition of pupils from year 6 into secondary school provision and any challenges identified.

2.3 Feedback from the group made clear that the pupils' needs should be demonstrated, with the opportunity for an annual review and the option for fixed 12-month funding replacing IPFA at the appropriate time.

2.4 It was made clear by the group the concern that EHCP numbers would increase as part of this work. It was shared alongside this work; the SEND assessment team are currently reviewing a high number of EHCP's in post 16 to identify if plans needed to be ceased. The relevant communication is taking place with young people/parent/carers.

2.4 Colleagues raised concerns regarding the 12-month funding due to EHCP completion times and it was made clear this could be looked at. The group also shared the view that the priority should be year 6 pupils to support transition.

2.5 It was agreed that as part of the pilot project, a strategy would be written regarding a new approach without IPFA's – this would be shared at the next appropriate high needs working group.

### **3.0 Provision for young people with an EHCP that cannot be accommodated on Wirral**

3.1 Katy Bird – Head of SEND, shared with the group the current challenges the SEND assessment team are facing placing a number of young people with an EHCP.

3.2 The group discussed the view of schools in relation to needing to know the funding a young person would receive prior to making a decision. In addition, Katy discussed cases where the LA had to direct schools to take young people with an EHCP. Colleagues agreed this needed to be avoided where possible. The request was made to develop clear principles regarding communication with schools prior to this decision being made.

3.3 The group then discussed further areas to be looked at that could support meeting the needs of children where specific themes have been identified by the SEND team. Colleagues agreed an agreed set of non-negotiables should be developed alongside the principles for communication, for example everyone agreed CLA with an EHCP should be the highest priority,

3.4 Further updates were then shared via LA officers, currently the LA commissioning team are developing SLA's for special schools and mainstream with a resourced provision/base. In addition, 6 out of borough providers are working with commissioning to develop better placements.

3.5 The group discussed the importance of reviewing the current cohorts of Wirral young people with an EHCP and make sure the current provision is meeting the required needs.

3.6 Finally, the group discussed the importance of including the provision of AP on Wirral as part of the work to support blended provision between providers. They also discussed the low exclusion rate on Wirral and if Progress Schools is currently under utilised due to the size of contract in place.

3.7 they agreed the following actions –

- Helen Hayes from SEND commission would attend the next High Need working group.
- A strategy to be developed regarding the route to direction for children with an EHCP.
- An alternative provision steering group with wider engagement from school leaders to be established.

### **4.0 Newton Europe – Delivering Better Value review**

4.1 The Assistant Director – Education shared the presentation document provided by Newton Europe for the DFE Delivering Better Value – to address the high needs deficit balance.

4.2 It was discussed the review would look at the current use of Wirral's High Needs block to allow comparison with other LA's that have also undertaken the same review. It was outlined the DFE are completing this review for all LA's with a deficit High Needs Block. The work will be completed in three phases, with Wirral falling in the last group.

4.3 The final report will be shared with Schools Forum once completed, it was made clear the review would not be looking specifically at provision on Wirral but how the High Needs Block is utilised.

4.4 Asako Brown – Finance Business Partner – Education shared that more information regarding the review would be available prior to work taking place in the New Year.

4.5 The group agreed it would be helpful for Simone White – Director of Children's Services to attend the next meeting to discuss this review further. The action was taken to share the invite.

## **RECOMMENDATIONS**

1. That the Forum notes the report.
2. That Forum receives a further report in the spring term from the High Needs Working Group

**Simone White**  
**Director of Children, Families and Education**

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## WIRRAL COUNCIL

SCHOOLS FORUM – Date 22<sup>nd</sup> November 2022

### REPORT OF THE DIRECTOR FOR CHILDREN, FAMILIES AND EDUCATION

### DE-DELEGATED BUDGET FOR SCHOOL IMPROVEMENT AND

### BEHAVIOUR SUPPORT UPDATE

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#### 1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to provide an update to Forum on the services delivered from the Behaviour Support and School Improvement functions funded by de-delegated school budgets.

1.2 For the financial year the following breakdown highlights the funds that are allocated to the de-delegated budgets for schools' improvement and behaviour support.

School improvement - £149,600

Behaviour support - £139,300

1.3 The local authority has a responsibility to have regard to the Schools Causing Concern statutory guidance. This guidance is clear, local authorities must exercise its education functions with a view to promoting high standards.

1.4 The local authority launched a new school improvement strategy, this is now being embedded across Wirral schools with increased capacity within the school improvement team, external school assurance professionals and thematic CPD based on the key areas of need from the analysis of key stage outcomes.

1.5 In relation to behaviour support the local authority now has increased capacity with a newly appointed senior officer of alternative provision and exclusions. In addition, the local authority has appointed additional inclusion strategy managers and inclusion officers to support schools.

#### 2.0 BACKGROUND

2.1 The local authority has several statutory duties and must exercise its function in these areas. In relation to oversight of Standard Assessment Tests.

2.1.1 Moderating of the teacher assessments carried out at the end of key stage 1 and 2 by schools in at least 25% of maintained schools each school year and ensure that every school will be subject to moderation at least once every four years.

2.1.2 Appointing a person to complete the assessment moderations who has recent experience of provision of the National Curriculum in primary schools.

- 2.1.3 Monitor the administration of the phonics screening check in accordance with Key stage 2 tests and phonics screening check.
- 2.2 The local authority has responsibility to support higher standards of education across the school it maintains. In addition, the local authority should work in partnership with the Regional Schools Commissioner to share any concerns they may have in relation to a local academy. To support this the local authority is embedding the school improvement strategy approved by committee last year.
- 2.3 The Strategy sets out a vision for school improvement to: raise aspirations and improve outcomes for all children in Wirral. It aligned to the proposed Wirral Plan 2026 and the priority to secure brighter futures for all regardless of their background.
- 2.4 The Head of School Effectiveness now has the support of three additional officers as Senior Schools advisors. They will support schools in relation to strategic objectives regarding improvement areas. In addition, they will be the main link between the schools and the commissioned School Assurance Professional and any CPD opportunities that are available to the school.
- 2.5 The school improvement team have commissioned CPD for Early Years, English and Maths to support primary schools for the remainder of the academic year. The training will be led by educational professionals who have a background of expertise in the given area.
- 2.6 A key cornerstone of the school improvement strategy is the support of a school assurance professionals to quality assure the current position of our maintained schools. This will be facilitated by education professional with the relevant experience to articulate with schools leaders and governors areas each school should be developing during the current academic year. This offer will be free for all maintained schools, academies can access this support, but this will have a cost associated.
- 2.7 The behaviour support service has increased significantly since the start of the academic year. Catherine Kerr in the role as Head of Inclusion is overseeing support for schools within this area.
- 2.8 The service are developing and implementing effective strategies to increase school's capacity to include young people experiencing difficulties with their emotional well-being and behaviour regulation with clear referral routes into the team Supporting the development of outreach delivered by specialist provision in partnership with SEND Team.
- 2.9 The service are developing LA wide training to educational professionals to support in managing young people with behavioral difficulties, for example Team Teach, of which the whole team are now qualified in delivering training to schools.
- 2.10 The inclusion team are working on three footprint model which aligns to the same clusters as the Senior School Advisors to allow collaboration between school improvement and inclusion. Each of the three groups now has an Inclusion Strategy Manager and an inclusion officer. The team are supported by a behaviour and exclusion officer.

2.11 In addition, the Senior Officer for exclusions and alternative provision will lead on the development of Alternative Provision linked to the Wirral Guild with strengthened Quality Assurance and challenge and will be the point of contact with Progress Schools – The LA commissioned provision for permanently excluded young people and those suffering significant trauma.

2.12 The inclusion team are also developing refreshed guidance on managed moves and personalised, blended curriculum.

### **3.0 RECOMMENDATIONS**

3.1 Endorse the developments in relation to the strategic use of de-delegated budgets to support school improvement and behaviour support.

3.2 Receive a further update in relation to de-delegated budgets in six months.

**James Backhouse**  
**Assistant Director of Education**

**Simone White**  
**Director for Children, Families and Education**

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## WIRRAL COUNCIL

WIRRAL SCHOOLS' FORUM 22<sup>nd</sup> November 2022

### REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

#### Forum Membership Review

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## 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.

Total Membership	Role	2018-2022	2019-2023	2020-2024	2021-2025	2022-2026	Total
5	Primary Headteachers			1	3	1	5
4	Primary Governors		1		2	1	4
1	Secondary Headteachers			1			1
1	Special Headteacher					1	1
1	Special Governors	1					1
1	Nursery Representative					1	1
<b>13</b>	<b>Total Schools Membership</b>						
9	Academy Representative		2		4		6
<b>9</b>	<b>Total Academy Membership</b>						
1	Non-teacher representative				1		1
1	Teacher representative		1				1
1	Catholic Diocese				1		1
1	Church of England Diocese				1		1
1	16-19 representative						0
3	PVI Early Years Providers				3		3
<b>8</b>	<b>Total Non-Schools Membership</b>						
<b>30</b>	<b>Total Membership</b>	<b>1</b>	<b>4</b>	<b>2</b>	<b>15</b>	<b>4</b>	<b>26</b>

## 1.3

There are currently still 3 Academy vacancies, due to receiving no response for new representatives from the request sent in September 2022.

There is still a vacancy for the 16-19 representative.

Expressions of interest have been sent out for nominations for the Special Governor representative post. The deadline for nominations is 25<sup>th</sup> November 2022.

Margaret Morris will continue as the Special Headteacher representative on an interim basis being replaced by Holly Barker early in the new year.

## 1.6 New Members

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

Shaun Allen, Chair of Finance Committee, Raeburn Primary School as the Primary Governor representative replacing Roy Wood.

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

## 1.7 Membership Changes

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

Current	Pupil no's		
	Jan 22 Census	Expected	
9 Primary	21,409	44.5%	8.5
1 Secondary	3,770	7.8%	1.5
9 Academy	22,934	47.7%	9.1
<b>19.0</b>	<b>48,113</b>	<b>100.0%</b>	<b>19.0</b>

## 2.0 Recommendations

2.1 Forum notes the report.

**Simone White**  
**Director of Children, Families and Education**



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	Sue Ralph	Primary Headteacher (Birkenhead N)	St Michael & All Angels	Sep-21	Aug-25
Schools	John McDonald	Primary Headteacher (Wallasey)	St Albans Primary	Sep-21	Sep-25
Schools	Emma Johnson	Primary Headteacher (Deeside)	Greasby Junior	Sep-21	Aug-25
Schools	Chris Mervyn	Primary Headteacher (Beb/Brom)	Brackenwood Infants	May-22	Apr-26
Schools	Charlotte Scott	Primary Governor	St Georges Primary	Aug-21	Jul-25
Schools	Shaun Allen	Primary Governor	Raeburn Avenue	Nov-22	Oct-26
Schools	Julie Merry	Primary Governor	Overchurch Infants/Cathcart	Jan-21	Dec-24
Schools	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	Nov-22	Oct-26
Schools	John Weise	Special Governor	Hayfield Primary	Dec-18	Nov-22
Schools	Kathryn Kennedy	Nursery Representative	Ganneys Meadow	Mar-22	Feb-26
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-21	Aug-25
Academy	Vacancy	Academy Rep			
Academy	Mark Bellamy	Academy Rep	Hilbre High School	Sep-21	Aug-25
Academy	Vacancy	Academy Rep			
Academy	Jon Bush	Academy Rep	Oldershaw Academy	Dec-21	Nov-25
Academy	Geraldine Fraser	Academy Rep	Prenton High School for Girls	Oct-19	Sep-23
Academy	Lisa Ayling (Temp)	Academy Rep	Lisa Ayling (Temp)	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	Joanne Proctor	Catholic Diocese	Christ the King	Sep-21	Aug-25
Non-Schools	Brian McGregor	Church of England Diocese	Woochurch CE Primary	Sep-21	Aug-25
Non-Schools	Vacancy	16-19 Provider			
Non-Schools	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	Jessica Trigg	PVI Early Years Providers	The Mulberry Tree	Oct-21	Sep-25

## WIRRAL COUNCIL

SCHOOLS FORUM 22<sup>nd</sup> NOVEMBER 2022

### REPORT OF THE DIRECTOR FOR CHILDREN, FAMILIES AND EDUCATION

#### DE-DELEGATED BUDGETS - CONTINGENCY, SPECIAL STAFF, AND INSURANCE COSTS

---

##### 1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to summarise the current provision for contingency, special staff, and insurance costs that are funded by de-delegated budget from Wirral's maintained primary and secondary schools.

##### 2.0 SCHOOL SPECIFIC CONTINGENCIES

2.1 This is a de-delegated budget, and is used for exceptional and unforeseen costs, which would be unreasonable to expect the schools and governing bodies to bear.

2.2 Special schools access these services on a buy-back basis.

2.2 This budget is used to meet adjustments for Business Rates, where actual charges are greater than those estimated when setting the budget. Other costs met from this budget vary each year, but in the past have included:

- Support for schools in Key Stage 1 where a larger than usual reception class (above the published admission numbers) requires additional staff;
- In exceptional cases deficits arising from closing schools;
- Support for managed moves

2.3 At January 2022 Schools Forum it was agreed to de-delegate this budget for primary and secondary maintained schools at £1.13 and £2.15 per pupil, respectively.

2.4 The contingency budget for 2022-23 is as follows:

	<b>Budget</b>
	<b>£</b>
Primary Schools	23,653
Secondary Schools	<u>7,592</u>
<b>Gross budget</b>	<b><u>31,245</u></b>

##### 3.0 SPECIAL STAFF COSTS

3.1 This de-delegated budget makes provision for staff maternity, paternity and trade union facility time for both teaching and non-teaching staff. It may also in certain circumstances meet additional costs arising from staff suspensions.

- 3.2 Maternity costs make up approximately 90% of the overall spend. While a member of staff is on maternity their costs are held centrally, while the school meets the cost of any required supply cover. Costs can vary greatly from year to year depending on the number of maternity cases, and the salary costs of those staff.
- 3.3 This budget also meets paternity costs, by reimbursing the cost of supply cover for the statutory 2 weeks of paternity leave allowed.
- 3.4 The Trade Union Facilities time budget has regard to guidance which confirms that representatives are entitled to reasonable paid time off during working hours to undertake Trade Union duties and relevant training. Wirral like many LA's has a local facility agreement in place. The budget for facility time also includes non-teacher representation.
- 3.5 Special Schools access these services on a buyback basis and there is a separate SLA for Academy schools.
- 3.6 Then financial position for 2021-22 was as follows:

	<b>Budget</b>	<b>Cost</b>
	<b>£</b>	<b>£</b>
Maternity/Paternity	602,738	783,211
Trade Union Facilities	86,362	63,033
Insurance & Recharges	<u>6,700</u>	<u>6,700</u>
<b>Total</b>	<b><u>696,000</u></b>	<b><u>852,944</u></b>

- 3.7 At January 2022 Schools Forum it was agreed to de-delegate this budget for primary and secondary maintained schools at £31.11 (staff £27.51 + TU £3.60) and £38.03 (staff £34.43 + TU £3.60), per pupil respectively.
- 3.8 The budget for special staff costs in 2022-23 is as follows:

	<b>Budget</b>
	<b>£</b>
Maternity, Paternity & Other Staff Costs	691,462
Trade Union Facilities	87,316
Insurance & Recharges	<u>6,700</u>
<b>Total budget</b>	<b><u>785,478</u></b>

#### **4.0 INSURANCE**

- 4.1 This budget covers the cost of governors' liability insurance for Voluntary Aided schools. A VA school's governing body should insure 10% of the replacement cost of the whole of the school premises. Where a VA school makes a claim under the policy, the Department for Education has the power (but not an obligation) to pay capital grant, usually at 90% of relevant expenditure, with governing bodies being responsible for the other 10%.
- 4.2 For several years Wirral schools have de-delegated budget to meet the cost of this insurance. Since 2017-18 only Primary schools have de-delegated, all secondary VA schools now having converted to Academy status.

- 4.3 VA schools purchase the insurance and can then claim the cost back from the Authority. Spend in recent years from this budget is as follows:

	<b>Spend £</b>
2018-19	11,000
2019-20	17,286
2020-21	10,931
2021-22	7,202

- 4.4 It should be noted that even though the governing body need only insure 10% of its premises liabilities, it is essential that proper security measures are taken to protect the premises and appropriate risk management advice to minimise losses is accessed.
- 4.5 At January 2022 Schools Forum it was agreed to de-delegate this budget for primary schools at £1.19 per pupil and this has resulted in a budget for 2022-23 of £24,909.

## **5.0 RECOMMENDATIONS**

- 5.1 That the Forum notes the report.

**Simone White**  
**Director for Children, Families and Education**

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## WIRRAL COUNCIL

### SCHOOLS FORUM – 22<sup>nd</sup> NOVEMBER 2022

#### REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

#### SCHOOLS REVENUE FUNDING 2023-24 NATIONAL FUNDING FORMULA

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### 1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to provide Forum with feedback from the consultation with schools on the 2023-24 Funding Formula and to consider requests to disapply specific the NFF in specific circumstances. The outcome of the consultation will inform the allocation of funding to schools which will then be considered in the budget recommendations presented to the February 2023 meeting of the Policy and Resources Committee.

### 2.0 BACKGROUND

2.1 As reported to Schools Forum at the October 2022 meeting, the Department for Education (DFE) announced in July 2022 that the 2023-24 provisional schools block allocation for Wirral will be £249,892,043

2.2 The provisional school block allocation includes the following changes:

- The core factors in the NFF (such as basic per-pupil funding, and funding for additional needs such as deprivation) will increase by 2.4%.
- The funding floor will ensure that every school is allocated at least 0.5% more pupil-led funding per pupil compared to its 2022-23 NFF allocation.
- Through the minimum per pupil funding levels, every primary school will receive at least £4,405 per pupil, and every secondary school at least £5,715

2.3 For 2023-24, Local authorities have the freedom to set the minimum funding guarantee (MFG) in local formulae between +0% and +0.50% per pupil and a consultation exercise has been undertaken with schools to obtain their views on the MFG level for 2023-24.

### 3.0 2022-23 FUNDING FORMULA CONSULTATION

3.1 The consultation took place between 6th October 2022 and 24<sup>th</sup> October 2022 and sought views on the following:

Level of MFG for 2023-24 for two options as follows:

- + 0.50% - this would give all schools at least the minimum 0.5% increase in per pupil funding and allow those due to gain most from the formula (i.e. those deemed underfunded) to gain closer to their full allocation.
  - + 0% - no adjustment added to the formula and some schools has less than 0.5% increase in per pupil funding, which the DfE expects to implement in the future years.
- 3.3 In addition, views will be sought on the usage of any funding that may be left following the allocation of the confirmed 2023-24 schools block allocation. For 2022-23, such funding was allocated to a Growth Fund and Falling Rolls Fund.
- 3.4 To support the consultation processes, the information made available to schools included a financial model to identify the indicative impact of the MFG options on each school.

#### **4.0 SUMMARY OF RESPONSES**

- 4.1 The responses to the consultation are be summarised as follows:

Q1 - What level of Minimum Funding Guarantee (MFG) would you like to be included in the funding formula from April 2023? There were 9 responses to this question with the 0.5% option being favoured albeit with a majority.

Q2 – Why have you selected this option? There were 8 responses and the key feedback on the reasons for selecting this option were around fairness and some of responses referred to the tight budget considering the increasing pressures from the inflation, salary increases and utility costs.

Q3 – Do you have any comments on how any spare capacity within the funding available should be allocated. For example, establish a Growth Fund and/or Falling Rolls Fund? There were 7 responses to this question, and 5 responses were supportive to set up a falling rolls and growth fund, with other suggestions that the fund to use to support SEN (Special Educational Needs) pupils.

#### **5.0 APPLICATION OF THE CONSULTATION OUTCOME**

- 5.1 The MFG rate of 0.5% will be applied to the formula for 2023-24 as per the outcome of the consultation with schools.
- 5.2 A falling rolls/growth fund will established from the headroom in the schools block final allocation after applying the MFG rate of 0.5%.

#### **6.0 DISAPPLICATION REQUESTS**

- 6.1 In certain circumstances, Local Authorities can request not to apply a specific aspect of the National Funding Formula.
- 6.2 As per section 8.7. of the Schools Operational Guide: 2023 to 2024, Wirral Council propose the submission of a disapplication request for Birkenhead High

School Academy on the basis that the relevant all-through minimum per-pupil funding levels (MPPL) value for that school is skewed significantly by unusual year group sizes. The MPPL allocated to all-through schools in the NFF is a composite of the primary and secondary schools' rate. Given that the primary school rate is lower than the secondary school rate, applying the composite rate financially disadvantages all-through schools where the number of secondary age pupils is significantly higher than primary age pupils. The submission of the request and subsequent approval by DfE would result in the application of the MPPL rate relevant to each phase.

- 6.3 The financial impact of this request has been modelled in the 2023-24 school indicative funding template and this has shown to have no adverse effect on any other school. It should be noted, however, that the 2023-24 funding model is indicative at this time.
- 6.4 The disapplication process requires the Local Authority to formally consult with Schools Forum and ask for their support on all disapplication requests submitted to the DfE, voting details and minutes of the relevant Schools Forum meetings are referenced on the disapplication requests forms.

## **7.0 RECOMMENDATIONS**

- 7.1 That the Forum notes the report.
- 7.2 Schools Forum's views are sought on the proposal to include +0.5% Minimum Funding Guarantee within Wirral's funding formula in 2023-24.
- 7.3 Schools Forum's views are sought on the proposal to a falling rolls/growth fund form any spare capacity within the 2023-24 school allocation
- 7.4 The mainstream primary and secondary school members agree to the submission of the disapplication request to DfE for Birkenhead High School Academy.

**Simone White**  
**Director of Children, Families and Education**

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## WIRRAL COUNCIL

### SCHOOLS FORUM – 22<sup>nd</sup> NOVEMBER 2022

#### REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

#### SCHOOL IMPROVEMENT MONITORING AND BROAKERAGE GRANT CONSULTATION OUTCOME

---

### 1.0 EXECUTIVE SUMMARY

- 1.1 The purpose of this report is to provide Forum with feedback from the consultation with schools on the de-delegation of the School Improvement Monitoring and Brokerage grant (SIMBG).

### 2.0 BACKGROUND

- 2.1 The SIMBG has been allocated to local authorities since September 2017 to allow them to continue monitor performance of maintained schools, broker school improvement provision and intervene as appropriate. The grant allocation was based on the number of maintained schools within the area and replaced the previous Education Services Grant (ESG) at a significantly reduced funding value.
- 2.2 In October 2021, Department for Education (DfE) launched the consultation “Reforming how local authorities’ school improvement functions are funded” and its outcome was published in January 2022, which confirmed that the grant payment to local authorities that funds the provision of school improvement services to local authority maintained schools would reduce by 50% in 2022-23 and be removed entirely in 2023-24.
- 2.3 The Council received £333k for SIMBG for the financial year 2021/22 and the grant is used to fund service provision for core school improvement activities for maintained secondary, primary and special schools in Wirral.
- 2.4 In line with the guidance issued by the DfE in the consultation response document, the Schools Forum’s views on schools to de-delegate funding in the financial year 2023-24 to recoup the loss of income was sought at the October 22 meeting.
- 2.5 It has been agreed at the meeting that the consultation process commenced in October 2022.

### 3.0 2022-23 FUNDING FORMULA CONSULTATION

- 3.1 The consultation took place between 12th October 2022 to 9th November and sought views on the following:
- Tiered funding model - group the maintained schools into 4 groups by their pupil numbers using the October 21 census. 4 groups and each tier’s contribution rate are proposed as the table below:

	Rate per school
For Schools with 199 pupils or less	£2,200
For Schools with 200-399 pupils	£3,400
For Schools with 400-699 pupils	£5,700
For Schools above 700 pupils	£12,000

- Per pupil model - £13.00 per pupil

#### 4.0 SUMMARY OF RESPONSES

4.1 There were 11 responses to the consultation and the outcome is summarised as table below:

Tiered Funding Model	6
Per Pupil Model	1
Opposed the de-delegations	1
Pending reply with queries	3

4.2 Individual queries have been communicated directly with the relevant responders. AD for Education will have verbal updates at the November 22 meeting.

#### 5.0 APPLICATION OF THE CONSULTATION OUTCOME

5.1 The tiered funding model is applied as a preferred option for the de-delegation of the SIMBG

5.2 The SIMBG will be included in the de-delegated budget.

#### 6.0 RECOMMENDATIONS

6.1 That the Forum notes the report.

**Simone White**  
**Director of Children, Families and Education**

## WIRRAL COUNCIL

### SCHOOLS FORUM – 22<sup>nd</sup> NOVEMBER 2022

#### REPORT OF THE DIRECTOR OF CHILDREN, FAMILIES AND EDUCATION

#### SCHOOLS BUDGET VARIATIONS 2022-23

---

### 1.0 EXECUTIVE SUMMARY

1.1 The purpose of this report is to provide an overview of the anticipated variations for the current year 2022-23 schools budget.

### 2.0 2022-23 SCHOOLS BUDGET

2.1 Overall the schools budget is forecast to overspend by £2.974m which is mainly due to pressure in the High Needs Block. This reflects an increase in the overspend of £1.07m from the position reported at the October 2022 meeting. The table below summaries the outturn position by funding block and a more detailed analysis is attached in Appendix 1.

	2022-23 Budget £	2022-23 Forecast £	2022-23 Variation Under/Over spend £
Schools Block	119,142,322	119,142,322	0
Schools Block de-delegated	1,819,643	1,801,936	17,707
Central School Services Block	3,579,849	3,533,583	46,266
High Needs	52,379,430	55,334,675	-2,955,245
Early Years	20,183,630	20,300,811	-117,181
DSG Grant Income	-195,355,485	-195,389,569	34,084
<b>Total before contribution to/-from Reserve</b>	<b>1,749,389</b>	<b>4,723,759</b>	<b>-2,974,370</b>
Movement on DSG Reserve	-289,889	-3,264,259	2,974,370
<b>Total after contribution to/-from Reserve</b>	<b>1,459,500</b>	<b>1,459,500</b>	<b>0</b>
Cumulative reserve balance b/fwd from 2021-22			-1,690,030
In-year contribution to/-use of reserve			-3,264,259
Cumulative reserve balance c/fwd to 2023-24			-4,954,289

2.2 The 2021-22 financial year closed with a Dedicated Schools Grant (DSG) reserve cumulative deficit position of £1.690m. The current forecast outturn position means that the year-end addition to reserve balance will be increased to £3.264m thus delivering a cumulative £4.954m deficit position at the end of 2022-23.

### 3.0 2022-23 BUDGET

3.1 There have been no changes to the budget since the position reported at the June 2022 meeting.

## **4.0 2022-23 FORECAST BUDGET VARIATIONS**

The budget variations that make up the £2.974m overspend are identified in the table attached Appendix 1. The reasons for the variations as well as comments on specific budget areas are given below.

### **4.1 Special Schools £166K adverse**

The budget includes additional places to address demand, and as reported at June 2022 meeting, the anticipated increase in number of places will exceed the budget set aside for 2022-23. The forecast reflects the allocation of additional 157 places on a temporary basis from September 2022. The final number of the places to be allocated to the special schools might increase further depending on the demand.

### **4.2 SEN Bases £121K favorable**

An overspend position of £8k was reported at the October 22 meeting, however, the forecast is revised to be £121k underspend. £129k movement is from the release of the allocation to one of the schools proposed to participate in the SEN Base project, as it has been decided that the project at the school is not going ahead. Additional base places created with the project are 24 places in 2 schools from September 22 and additional 20 places in 2 schools from January 23.

### **4.3 Early Years £15k 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 (DAF) ring-fenced funding which is confirmed £14,800 more than the figure included in the budget - £116,800 for 2022-23.

### **4.4 Schools Block de-delegated £17.7k Favorable**

A small favorable variance related to the insurance costs which is forecasted to be the same level of as the past years.

### **4.5 Central School Costs £46K favorable**

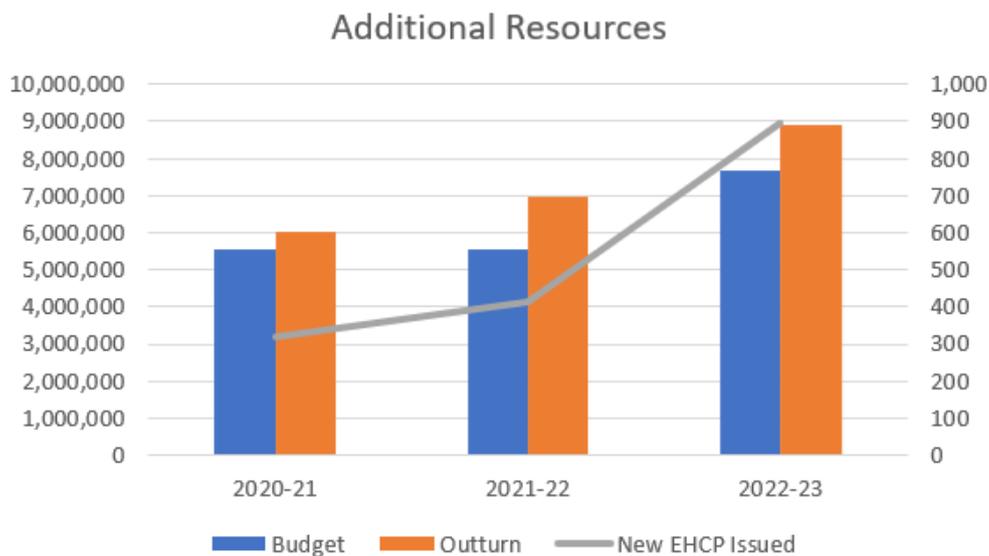
- Admissions - £15k favorable variance due to staff costs.
- Schools Forum - £5k favourable. Although there is no formal spend plan for this budget at this time, it is expected that a return to face to face meetings later in the year will incur meeting related costs.
- Contingency - £25.4k favourable. No potential calls on this contingency have been identified at this time.

### **4.6 Special Education Needs - Additional resources £1.279m adverse**

Demand on this budget keeps growing in line with the requests for Education, Health and Care Plan (EHCP) assessments. Requests increased by around 28% in the period to October 22 compared to last year. Not all the requests will result in a financial outcome, but it is expected that a significant portion will result in Units of Resource being awarded and this will result in an overspend of £890k

for Primary school pupils and £340k for Secondary school pupils. The forecasted deficit for this budget has been increased by £379k from the forecast reported at the October 22 meeting due to new EHCPs are issued more than anticipated. Currently additional EHCP Coordinators are engaged to address the backlog of the outstanding assessment and the number of EHCP issued has been significantly increased. The total number of the EHCP issued in the period between April to October 22 is 499, compared with 414 issued in 2021-22.

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



	Budget	Outturn	New EHCP Issued
<b>2020-21</b>	£5,567,200	£6,021,938	318
<b>2021-22</b>	£5,567,200	£6,952,272	414
<b>2022-23</b>	£7,653,857	£8,904,554	896

Please note the outturn and EHCP number for 2022-23 are forecasted figures.

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

#### 4.7 Special Education Needs – Top Ups £99k 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	9,625,088	9,318,356	306,732
Top-Ups for Resourced Provision	2,217,681	2,097,264	120,417
Alternative Provision	1,318,200	1,318,200	0
FE & 6th Form Top-Ups	2,225,000	2,594,499	-369,499
Additional Nursing Support	160,000	125,843	34,158
Exceptional Needs	1,390,500	1,383,720	6,780
<b>Total</b>	<b>16,936,469</b>	<b>16,837,881</b>	<b>98,588</b>

The exceptional needs allocation has been reviewed and revised since the last report and together with the additional pressure from Further Education & 6<sup>th</sup> form top up costs, the favourable balance for this area is reduced by £423k. Whilst the budget is forecasted as an underspend in 22-23, the forecasted expenditure is £2.25m higher than the total expenditure in 21-22. The budget has been increased significantly in 22-23 reflecting the increase in demand. The need for this budget will be increased according to the increase in the number of places in the special schools and SEN bases. The position will be monitored closely, and the forecast position re-assessed accordingly.

#### **4.8 Independent Special Schools £1.407m adverse**

The demand continues to increase more than anticipated and this budget is forecasted to be an overspend of £1.407m despite the budget has been increased in 22-23.

#### **4.9 Support for SEN £69k favourable**

There are several activities and services that are delivered by this budget including Hearing and Vision, Communication Differences, Vulnerable Children, Pre School-Portage and Physical/Medical Impairment and all are expected to be delivered within the overall 2022-23 budget with a small underspend.

#### **4.10 Dedicated Schools Grant £34k favourable**

The favorable variance relates to the following adjustments:

- High Needs Recoupment £5,833
- High Needs Import Export £6,000
- Early Years 21-22 grant adjustment £7,451
- DAF allocation adjustment £14,800

### **5.0 DELIVERING BETTER VALUE (DBV) PROGRAMME**

5.1 The Department for Education (DfE) announced DBV programme in February 2022, which is designed to provide dedicated support and funding to help 55 local authorities with substantial, but not severe, deficit issues in their high needs block of the DSG to reform their high needs system. It aims to put more local authorities on a more sustainable footing forthcoming so that they are better placed to respond to the forthcoming special educational needs and disabilities (SEND) reform.

5.2 The first 20 of 55 local authorities started the phase 1 work in June this year and Wirral has been invited to participate in tranche 3, which is expected to start early 2023. DfE has allocated £85m nationally for this programme.

5.3 A further 14 authorities with more severe deficits are engaged in the Safety Valve project which involves contractual arrangements with DfE. The High Needs block deficits (21/22 forecasted) of these local authorities are mainly between £20m and £40m, with the highest is £118.4m (Surry)

5.4 The Forum will be updated with further details when the engagement to the programme commences in 2023.

## **6.0 RECOMMENDATIONS**

6.1 That the Forum notes the report and the forecast financial position of the Schools Budget for 2022-23.

6.2 That the Forum notes the Council's participation in DBV programme.

**Simone White**

**Director of Children, Families and Education**

**Appendix 1 - Budget Variations 2022-23**

	2022-23 Budget	2022-23 Forecast	2022-23 Variation
<b>Individual Schools Budget</b>			
Primary	96,718,989	96,718,989	0
Secondary	22,291,955	22,291,955	0
Special	13,411,216	13,577,252	-166,036
Wirral Hospitals School	1,589,422	1,589,422	0
SEN Bases	1,112,565	991,639	120,926
Sixth Form/Further Education	268,000	268,000	0
Early Years	19,199,369	19,214,169	-14,800
Growth and Falling Rolls Fund	131,378	131,378	0
<b>Individual Schools Budget Total</b>	<b>154,722,894</b>	<b>154,782,804</b>	<b>-59,910</b>
<b>Central School Costs</b>			
Early Years Costs	534,261	534,261	0
Admissions	388,009	372,674	15,335
School Redundancy Costs	76,000	75,803	197
Licenses and subscriptions	259,856	259,856	0
Schools Forum	10,600	5,300	5,300
Contingency	25,434	0	25,434
Contribution to combined budgets	630,450	630,450	0
PFI Affordability Gap	1,459,500	1,459,500	0
Retained duties Central (ex-ESG)	730,000	730,000	0
<b>Costs delegated to/de-delegated from schools</b>			
Library Service	183,783	183,783	0
Insurances	24,909	7,202	17,707
School Specific contingencies	31,245	31,245	0
Special Staff Costs	785,478	785,478	0
Behaviour Support	142,131	142,131	-0
School Improvement	149,999	149,999	0
Retained duties de-delegated (ex-ESG)	502,098	502,098	0
<b>High Needs Pupils</b>			
Additional resources	9,665,491	10,944,870	-1,279,379
SEN top-ups	16,936,469	16,837,881	98,588
High Needs contingency	561,104	1,055,536	-494,432
Independent Special Schools	6,734,980	8,141,456	-1,406,476
Home Tuition	364,166	364,166	-0
Support for SEN	2,127,817	2,058,636	69,181
Special School Transport	58,200	58,200	0
<b>Non-delegated school costs Total</b>	<b>42,381,980</b>	<b>45,330,525</b>	<b>-2,948,545</b>
<b>Total Costs</b>	<b>197,104,874</b>	<b>200,113,328</b>	<b>-3,008,454</b>
<b>Funding</b>			
Dedicated School Grant	-195,355,485	-195,389,569	34,084
<b>Total before Movement in DSG Reserve</b>	<b>1,749,389</b>	<b>4,723,759</b>	<b>-2,974,370</b>
Contribution to/-from DSG Reserve	-289,889	-3,264,259	2,974,370
<b>Grand Total</b>	<b>1,459,500</b>	<b>1,459,500</b>	<b>0</b>

WORKPLAN

Meeting Date	Tuesday 17th January 2023	March 2023 Provisional meeting	Tuesday 13 <sup>th</sup> June 2023
<b>Virtual / Physical</b>			
Budget	Budget Monitoring 22-23 Q3 Schools Budget 23-24 De-delegation of budgets School Balances update		Provisional outturn 2022-23 Schools Budget 2023-24 School Balances update -
Consultation			- - - -
DfE Regs & guidelines	Schools Forum Membership If updated · DfE Operational Guide · School Finance Regs Scheme for Financing Schools		Schools Forum Membership If updated · DfE Operational Guide · School Finance Regs Scheme for Financing Schools
Working Groups	High needs Early Years		High Needs Early Years
Other	Sensory Support Service Update Energy update Wirral Alternative Provision Update		LACES /LAC PP Update - Home Continuing and Education Service (HCES) update  Agree Meeting dates

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