



SCHOOLS FORUM

7 March, 2023 at 4.00 pm

Meeting to be held via: **Microsoft Teams**

Livestream <http://www.WalsallCouncilWebcasts.com>

MEMBERSHIP:	Mr M. Vlahakis	Primary Head Teacher, Cadmus Family of schools
	Mrs C. Draper	Primary Head Teacher, Short Heath Federation
	Mrs A. Arnold	Primary Head Teacher, Delves Infant School
	Mrs J. Garratt	Primary Head Teacher, Walsall Wood
	Mr S. Davies	Primary Head Teacher, Christ Church CE (C) JMI School
	Mrs N. Boys	Primary Academy Head Teacher, Lodge Farm
	Mr M. Moody	Primary Academy Representative, Goldsmiths and Rivers Academies
	Mrs S. Bowen	Secondary Maintained Head Teacher, St. Thomas More Catholic School
	Mr A. Seager	Secondary Academy Head Teacher, Bloxwich Academy
	Ms A. Stoddart	Secondary Academy Head Teacher, Shire Oak Academy
	Mr W. Downie	Secondary Academy Head Teacher, Streetly Academy
	Mrs L. Foster	Primary Governor, Short Heath Federation
	Mr M. Fox	Primary Governor, Kings Hill Primary
	Mr I. Baker	Secondary Academy Governor, Grace Academy
	Mrs C. Fraser	Special School Head Teacher, Castle Business and Enterprise College
	Mrs E. Phillips	Academy Special School, Phoenix Academy
	Mr C. Bury	Principal, The Ladder School, Alternative Provision
	Ms J. Barr	Special School Governor
	Ms M. Turley	Nursery Head Teacher, Ogley Hay Nursery
	Mr T. Hopkins	PVI Representative
	Mr S. Pritchard-Jones	Pupil Referral Unit representative
	Vacancy	16-19 School Forum Representative
OBSERVERS:	Councillor M. Statham	Cabinet Portfolio holder for Education and Skills
	Mr A. Orlik	Observer, C of E Diocese
	Ms S. Guy	Observer, National Education Union

Quorum – 8 members

A G E N D A

1.	Welcome and explanation of rules of procedure for virtual meeting	
2.	Apologies	
3.	Minutes – 17 th January, 2023 – Copy Enclosed	
4.	Matters arising from the Minutes: To consider any matters arising from the minutes which do not occur elsewhere on the agenda.	
5.	Late items (urgent) to be introduced by the Chair.	
6.	Local Government (Access to Information) Act 1985 (as amended): To agree that the public be excluded from the private session during consideration of the agenda items indicated for the reasons shown on the agenda.	
7.	Early Years Funding Formula – Copy Enclosed.	
8.	High Needs Funding Formula (Outcome) – Copy Enclosed	
9.	Walsall Learning Alliance (termly update) – Verbal Update.	
10.	Correspondence – to receive any other items of correspondence that might be of interest or have an effect on the Forum: None received.	
11.	Forward Plan – Copy enclosed.	
12.	Late items (if any)	
13.	Dates of future meeting: <ul style="list-style-type: none"> Tuesday 20 June, 2023 at 4.00 p.m. 	

The Relevant Authorities (Disclosable Pecuniary Interests) Regulations 2012

Specified pecuniary interests

The pecuniary interests that are specified for the purposes of Chapter 7 of Part 1 of the Localism Act 2011 are the interests specified in the second column of the following:

Subject	Prescribed description
Employment, office, trade, profession or vocation	Any employment, office, trade, profession or vocation carried on for profit or gain.
Sponsorship	<p>Any payment or provision of any other financial benefit (other than from the relevant authority) made or provided within the relevant period in respect of any expenses incurred by a member in carrying out duties as a member, or towards the election expenses of a member.</p> <p>This includes any payment or financial benefit from a trade union within the meaning of the Trade Union and Labour Regulations (Consolidation) Act 1992.</p>
Contracts	<p>Any contract which is made between the relevant person (or a body in which the relevant person has a beneficial interest) and the relevant authority:</p> <p>(a) under which goods or services are to be provided or works are to be executed; and</p> <p>(b) which has not been fully discharged.</p>
Land	Any beneficial interest in land which is within the area of the relevant authority.
Licences	Any licence (alone or jointly with others) to occupy land in the area of the relevant authority for a month or longer.
Corporate tenancies	<p>Any tenancy where (to a member's knowledge):</p> <p>(a) the landlord is the relevant authority;</p> <p>(b) the tenant is a body in which the relevant person has a beneficial interest.</p>
Securities	<p>Any beneficial interest in securities of a body where:</p> <p>(a) that body (to a member's knowledge) has a place of business or land in the area of the relevant authority; and</p> <p>(b) either:</p> <p>(i) the total nominal value of the securities exceeds £25,000 or one hundredth of the total issued share capital of that body; or</p> <p>(ii) if the share capital of that body is more than one class, the total nominal value of the shares of any one class in which the relevant person has a beneficial interest exceeds one hundredth of the total issued share capital of that class.</p>

Schedule 12A to the Local Government Act 1972 (as amended)

Access to information: Exempt information

Part 1

Descriptions of exempt information: England

1. Information relating to any individual.
2. Information which is likely to reveal the identity of an individual.
3. Information relating to the financial or business affairs of any particular person (including the authority holding that information).
4. Information relating to any consultations or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority or a Minister of the Crown and employees of, or office holders under, the authority.
5. Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings.
6. Information which reveals that the authority proposes:
 - (a) to give any enactment a notice under or by virtue of which requirements are imposed on a person; or
 - (b) to make an order or direction under any enactment.
7. Information relating to any action taken or to be taken in connection with the prevention, investigation or prosecution of crime.
8. Information being disclosed during a meeting of a Scrutiny and Performance Panel when considering flood risk management functions which:
 - (a) Constitutes a trades secret;
 - (b) Its disclosure would, or would be likely to, prejudice the commercial interests of any person (including the risk management authority);
 - (c) It was obtained by a risk management authority from any other person and its disclosure to the public by the risk management authority would constitute a breach of confidence actionable by that other person.

Walsall Council Schools Forum

Minutes of meeting held on Tuesday, 17 January 2023 at 4.00 pm

Digital Meeting via Microsoft Teams

Schools Forum Members Present:

Mr M. Vlahakis	Primary Head Teacher, Cadmus Family of schools
Mrs C. Draper	Primary Head Teacher, Short Heath Federation
Mrs A. Arnold	Primary Head Teacher, Delves Infant School
Mrs J. Garratt	Primary Head Teacher, Walsall Wood
Mr A. Seager	Secondary Academy Head Teacher, Bloxwich Academy
Mrs N. Boys	Primary Academy Head Teacher, Lodge Farm
M. Moody	Primary Academy Representative, Goldsmiths and Rivers Academies
Mr W. Downie	Secondary Academy Head Teacher, Streetly Academy
Mrs L. Foster	Primary Governor, Short Heath Federation
Mr I. Baker	Secondary Academy Governor, Grace Academy
Mrs C. Fraser	Special School Head Teacher, Castle Business and Enterprise College
Mr C. Bury	Principal, The Ladder School, Alternative Provision
Ms M. Turley	Nursery Head Teacher, Ogley Hay Nursery
Mr T. Hopkins	PVI Representative

Officers Present:

Mrs S. Kelly – Director of Access and Inclusion
Mr R. Walley – Technical Accounting, Treasury Management & Education Finance Manager
Mr L. Haynes – Head of Finance – Technical & Transactional
Mr N. Picken – Principal Democratic Services Officer
Mr R Thomas – Head of Inclusion
Ms J Nash - SEND
Ms L. Meredith – Finance Business Partner

Observers Present: S. Guy (National Education Union)

		Action
1. 17.01.23	Welcome Mr Seager chaired the meeting at the request of Mr Vlahakis. In doing so, he suggested that members raise the issue of attendance at their respective forums to ensure that appointees were still in a position to commit to the role.	

	<p>The Chair opened the meeting by welcoming everyone and explaining the rules of procedure and legal context in which the meeting was being held. He also directed members of the public viewing the meeting to the papers, which could be found on the Council's Committee Management Information System (CMIS) webpage.</p> <p>A roll call was taken of those members present who confirmed they could both see and hear the proceedings.</p>	
<p>2. 17.1.23</p>	<p>Apologies</p> <p>An apology for absence had been received from Mr Davies, Mr Prichard Jones.</p>	Noted
<p>3. 17.1.23</p>	<p>Minutes</p> <p>The Minutes of the meeting held on 13 December 2022 were approved as a true and accurate record.</p>	
<p>4. 17.1.23</p>	<p>Matters Arising from the Minutes of 13th December 2022</p> <p>None.</p>	Noted
<p>5. 17.1.23</p>	<p>Late Item/s (urgent) to be introduced by the Chair</p> <p>It was reported that correspondence had been sent to the Chair of Primary Forum in relation to the voting process and other governance related issues.</p>	Noted
<p>6. 17.1.23</p>	<p>Local Government (Access to Information) Act 1985 (as amended)</p> <p>There were no items for consideration in the private session.</p>	
<p>7. 17.1.23</p>	<p>Final Mainstream Funding Formula 2023/24</p> <p>A report was submitted: -</p> <p>(See annexed)</p> <p>The Chair referred to the recommendations and advised that he was aware that the latter recommendation (to recommend the formula to the Director of Children's Services, the Portfolio Holder for Education and Skills, and the ESFA) was not required as the proposal was approved by Cabinet and will be implemented.</p>	

	<p>As such, Schools Forum were asked to note the overall level of dedicated schools grant and note the funding factor values for 2023/24.</p> <p>Mr Vlahakis confirmed that there had been an in-depth discussion at the previous meeting and highlighted that Cabinet had supported the recommendation from Schools Forum.</p> <p>The Finance Manager -Technical & Transactional, concurred and referred Forum Members to paragraph 4.6 of the report. He stated that whilst all factors were initially moved 50% closer to NFF rates, as endorsed by Schools Forum and approved by Cabinet in December 2022, this did not fully allocate all funding that was available within the Schools Block (as is required in the regulations). As such two additional changes were required, to ensure that the remaining funding is allocated to every school</p> <p>Resolved</p> <p>That: -</p> <ol style="list-style-type: none"> 1. That the overall level of Dedicated Schools Grant (DSG) funding that will be received for 2023/24 be noted; and 2. The funding factor values for 2023/24, which ensure that allocations to mainstream schools via the local funding formula are both affordable within the funding that is available, be noted. 	
<p>8.</p> <p>17.1.23</p>	<p>Central Expenditure Budgets 2023/24</p> <p>A report was submitted: -</p> <p>(See annexed)</p> <p>The Director of Access and Inclusion updated Forum on the Local Authority School Improvement Monitoring and Brokering (LAMB) Grant. It was explained that the vote not to de-delegate the remaining 50% of the Lamb grant back to the Local Authority to meet its statutory duties in relation to school improvement guidance had been referred to the Secretary of State who had overturned the decision and therefore the de-delegated funds which were requested will now be de-delegated back to the Local Authority to fulfil its statutory duty.</p> <p>Mr Vlahakis referred to establishing a Working Group to discuss how to move forwards in future with the LAMB grant. The Director of Access and Inclusion confirmed that all schools would need to be involved to drive it forward as schools would have 50% of the funding. They would need to identify how to spend that money to improve outcomes for children. The Local</p>	

	<p>Authority would offer to be a part of the group and support its development.</p> <p>Resolved (by roll call)</p> <p>That Schools Forum approve tables 1 and 2 as set out to form the basis for central expenditure for the 2023/24 financial year.</p>	
<p>8. 17.1.23</p>	<p>Correspondence</p> <p>School Improvement De Delegation Letter</p> <p>This had been addressed during discussion on the Central Expenditure Budgets.</p>	
<p>9. 17.1.23</p>	<p>Forward Plan</p> <p>A discussion was held in relation to SEND updates.</p> <p>The Director of Access and Inclusion confirmed that Schools Forum was a finance rather than operational forum. However, an update would be provided at the next meeting during the Walsall Learning Alliance item. It was suggested that members of the SEND team could attend the WASH and PNS to discuss developments and improvements in addition to updates at the next virtual heads session.</p> <p>Resolved:</p> <ol style="list-style-type: none"> 1. That the following item be added to the Forward Plan: - <ul style="list-style-type: none"> • Review of membership; and 2. That the Forward Plan be noted. 	<p>SK to arrange.</p> <p>Added to June, 2023</p>
<p>10. 17.1.23</p>	<p>Late Items</p> <p>None.</p>	
<p>11. 17.1.23</p>	<p>Date and Time of next meeting</p> <p>It was noted that the next meeting would be held on Tuesday 7 March 2023 at 4.00pm</p>	

The meeting terminated at 4.47 pm.

Signed

Date:

School Forum 7th March 2023

Proposed Early Years Funding Formula for two, three & four years olds - 2023/24

1. Purpose of report

- 1.1 The Early Years funding formula is the local process that is utilised (informed by national early years funding guidance) to allocate the Early Years block of the Dedicated Schools Grant (DSG) funding that the Council receives to the early years providers in Walsall.

2. Recommendations

- 2.1 That Schools Forum notes the work undertaken by officers and recommends the Early Years Funding Formula that is proposed for 2023/24 to Cabinet.
- 2.2 Schools Forum are asked to note that this recommendation will then be reported to Cabinet on 22nd March 2023 to seek their approval.

3. Background

- 3.1 The Early Years National Funding Formula (EYNFF) was introduced in April 2017 to deliver affordable, flexible and high quality childcare for all parents and eligible children via a funding system which is fair for providers and local authorities.
- 3.2 Early Years Block of the Dedicated Schools Grant (DSG) is paid to local authorities, who have a statutory duty to ensure sufficient early years places are available to meet the requirements in their area, and this funding is then paid by the local authority to providers based on the actual number of hours of funded childcare that is delivered.
- 3.3 In England all children aged 3 & 4 are currently entitled to 570 hours of funded childcare per year (normally provided as 15 hours per week over the 38 week school year). Additionally the 2017 funding reforms expanded provision for 3 and 4 year old to include a 30 hour entitlement for working parents.
- 3.4 A further element of the EYNFF is funding of free entitlement for disadvantaged 2 years olds. Unlike funding for 3 & 4 year olds, which must be allocated via a local early years funding formula, local authorities are encouraged to fund providers on the basis of a flat hourly rate.
- 3.5 Early Years Funding operational guidance sets out the funding factors permitted within the local funding formula for early years and the requirement of a 95% pass-through of funding to early years providers, thereby limiting the amount of funding that can be retained by the local authority to fund central expenditure on early years entitlement to a maximum of 5%.

4. Proposed Early Years Funding Formula

- 4.1 Operational guidance sets out the funding factors that are permitted within the early years local funding formula, these include a universal hourly base rate, a mandatory deprivation factor, discretionary supplements and additional funding in respect of maintained nursery schools.
- 4.2 Table 1 therefore sets out the proposed areas of the local Early Years Funding Formula (EYFF), highlighting the estimated cost of each area to be funded from the indicative allocation of £22.774m of Early Years Block Funding of the DSG that will be received in 2023/24, with a narrative describing each area set out below the table.
- 4.3 It should be noted that Early Years allocations are revised throughout the year as they are in the main based on an estimate of hours that will be provided and final funding is then updated based on actual hours delivered in year.

Table 1 – Proposed Early Years Expenditure	
Provision	Estimated Cost against Early Years Block of DSG for 2023/24 (£m)
Universal and additional hours for 3 and 4 year olds	16.236
Deprivation Supplement	0.147
Entitlement hours for 2 year olds	3.734
Maintained Nursery Schools Supplement (MNSS)	1.632
Early Years Pupil Premium (EYPP)	0.295
Disability Access Fund (DAF)	0.140
SEN Inclusion Fund (SENIF) 3&4 years olds	0.070
SEN Inclusion Fund (SENIF) 2 years olds	0.020
Central expenditure on early years entitlement	0.500
Total	22.774

Universal and additional hours for 3 and 4 year olds

- 4.4 The operational guidance includes a requirement to pay a **universal** hourly base rate to **all** early years' providers for the provision of free entitlement hours for 3 & 4 year olds. The universal hourly base rate must, in all cases, be multiplied by the hours of attendance of children at each setting – up to a maximum of 570 hours of funded childcare per year (or a maximum of 1140 hours for those children eligible for the additional offer for working parents).
- 4.5 It should be noted that during 2022/23 a separate grant was paid to the local authority and passed on maintained nursery schools and nursery classes in primary schools for additional costs relating to teachers pay and pension changes (known as TPPG – Teachers Pay and Pension Grant). However from 2023/24 that funding has been rolled in to the general 3 and 4 year old funding within the Early Years block of DSG, and given the requirement to utilise a

universal hourly rate which is payable to all providers it is no longer possible to direct this element of former TPPG funding just to certain settings (i.e. maintained nursery schools and nursery classes in primary schools), and there are no other allowable factors through which such funding could be distributed.

- 4.6 As such this required change will have a direct financial impact on those settings who previously received the separate TPPG funding in 2022/23, as the costs that the former grant were meant to fund will continue but the stand alone funding to support those costs has been removed and incorporated into the universal 3 and 4 year old hourly rate.
- 4.7 To therefore seek to reduce this impact as much as possible it is proposed that the full increase in 3 and 4 year old hourly rate funding that the authority receives is passported in totality within the universal hourly rate paid to 3 and 4 year old providers for 2023/24.

Deprivation Supplement

- 4.8 Deprivation is a mandatory supplement local authorities must use in their Early Years Funding Formula to recognise deprivation in their area. Operational guidance does not set out how funding for deprivation is to be allocated and this is determined locally.
- 4.9 The proposed Walsall local EYFF allocates deprivation funding on the number of children recorded on prior year January census and headcount, whose postcode falls within band A of the Income Deprivation Affecting Children Index (IDACI).

Entitlement hours for 2 year olds

- 4.10 As with 3 & 4 year old funding, the funding for disadvantaged 2 year olds is paid on the basis of a flat hourly base rate.
- 4.11 Unlike the funding requirements for 3 & 4 year olds, there is no regulatory pass through rate in respect of early years block funding for 2 year olds and similarly there are no requirements in respect of mandatory or discretionary supplements.

Maintained Nursery Schools Supplement

- 4.12 This represents an element of additional funding for maintained nursery schools, known as the Maintained Nursery Schools Supplement (MNSS).
- 4.13 In previous years formulas a set funding value (which did not then move throughout the year) was paid to the local authority and was allocated to maintained nursery schools as a lump sum allocation, which increased in value based on the capacity of each maintained nursery school.
- 4.14 From 2023/24 the funding for this supplement that is paid to local authorities has changed to ensure that it is being shared more evenly across all local authorities with MNSS, and the DFE, following consultation, have now introduced a minimum value and a cap value on the hourly funding rate that

local authorities can receive for their MNSS and which can then be allocated to maintained nursery schools. In 2023/24, the minimum hourly rate is £3.80 and the cap has been set at £10 per hour.

- 4.15 The allocated funding to local authorities will be based on an estimate of hours to be provided by maintained nursery schools, and unlike in previous years the final value paid to the local authority will vary based on the actual number of hours provided. As such the authority cannot continue to retain a static lump sum MNSS allocation (as funding will not be static) and the way in which MNSS funding is allocated has to change.
- 4.16 The local EYFF therefore proposes that for 2023/24 the full allocation that the authority receives for MNSS funding, of £3.80 per hour, is also utilised as the basis for allocating the MNSS funding i.e. the full value received will be passed on to maintained nursery schools based on the actual number of hours provided – if the number of hours increases the funding allocated to the local authority and then paid to the setting will also increase, and if the number of hours reduces so will the funding.
- 4.17 Financial modelling of this change indicates that there may be one maintained nursery school that will see a significant adverse impact from this change (of circa £35k per year), and that will not be offset by the increase in 3 and 4 year old universal funding proposed above (where that same school will potentially see a reduction compared to 2022/23 due to the fall out of TPPG funding of circa £20k i.e. a potential total adverse impact on that school for 2023/24 of circa £55k – however the final impact cannot be determined at this stage as this will be dependent on actual hours of funded childcare that are delivered during 2023/24).
- 4.18 Unfortunately given the funding requirements there are no further changes that can be incorporated in to the local EYFF to help to offset this impact further, however ongoing discussions have been taking place with maintained nursery schools in Walsall over last 5 years to prepare for the risk of the MNSS falling out or reducing and those schools have worked to identify potential actions that can be taken to ensure ongoing financial viability. The authority will therefore work with the nursery concerned to update that plan and identify relevant actions that may now need to be implemented.

Early Years Pupil Premium (EYPP)

- 4.19 The Early Years Pupil Premium (EYPP) gives early year providers additional funding to support disadvantaged 3 & 4 year old pupils who are in receipt of the universal 15 hours entitlement and are in receipt of any one of the benefits criteria detailed in Early Years Operational Guidance.

Disability Access Fund (DAF)

- 4.20 The Disability Access Funds (DAF) was introduced to support disabled 3 & 4 year old children accessing their early years free entitlement. DAF funds can

be used, for example, to support providers in making reasonable adjustments to their settings.

Central Expenditure on Early Years Entitlement

- 4.21 A set out in 3.5, the maximum amount of funding that can be retained centrally is 5% of the early years block. The £500k retained budget, equating to 2.2% (a reduction from 2.4% in 2022/23) was approved by Schools Forum at their meeting on 17th January 2023 and reflects the cost of providing central services in support of the early years entitlement for 2, 3 and 4 year olds.

Special Education Needs Inclusion Fund

- 4.22 In addition to the funding areas shown in table 1, there is a requirement for local authorities to operate a Special Educational Needs Inclusion Fund (SENIF) for 3 & 4 year olds with SEN who are taking up free entitlement.
- 4.23 SENIF for 2 year olds is not a funding requirement, however local authorities can choose to establish a fund as part of their provision should they wish to do so and an agreement to fund SENIF for eligible 2 year olds as part of Walsall's early years provision is in place.
- 4.24 SENIF is to be used to target children with lower or emerging SEN. Children with more complex needs and those in receipt of an education, health and care plan will continue to be funded via the high needs block of the DSG.

Detailed Funding Factor Values

- 4.25 Appendix A below confirms the proposed funding factors and their values for the 2023/24 Early Years Funding Formula.
- 4.26 It should be noted that the early years guidance also permits a number of additional discretionary supplements including rurality; quality; flexibility and English as a second language, however none of these permitted discretionary supplements feature in the proposed Early Years Funding Formula (and none have been utilised in previous years).

5. Financial implications

- 5.1 The exact financial impact on individual providers cannot be predicted at this time as this will be dependent on actual hours of funded childcare that are delivered during 2023/24. Financial modelling does indicate that there may be one maintained nursery school that will see a significant adverse impact from the changes proposed to the funding formula (mainly as a result of the required changes to the allocation of MNSS funding). Discussions have been taking place with maintained nursery schools in Walsall over last 5 years to prepare for the risk of the MNSS falling out or reducing and those schools have worked to identify potential actions that can be taken to ensure ongoing financial viability. The authority will therefore work with the nursery concerned to update that plan and identify relevant actions that may now need to be implemented.

- 5.2 Current financial modelling indicates that the proposed financial arrangements set out in table 1 would be affordable within the Early Years Block funding provided within the Dedicated Schools Grant for 2023/24. It should be noted that, as the January 2023 census data is not yet available, prior year data has been used in the funding model to estimate affordability, however updated modelling will be undertaken once the January 2023 census data is available – but it should be noted that any risk associated with this is minimal as if the January census shows a significant increase in the number of hours provided then this would attract additional funding to the authority to then pass on to providers.
- 5.3 A universal base hourly rate of £4.86 per hour for 3 & 4 year olds would equate to an increase of 22 pence per hour to 2022/23 rates (passing on in full the hourly rate increase allocated to the authority within the national EYFF), and the flat base rate for disadvantaged 2 year olds of £5.51 per hour is an increase of 6 pence per hour from 2022/23 (again passing on in full the hourly rate increase allocated to the authority within the national EYFF).
- 5.4 Indicative budget shares are proposed to be issued to all providers in March 2023, the local authority will utilise the January census data to calculate the initial indicative budget. These will just be indicative summaries at this point, and any actual payments made to providers throughout the financial year of 2023/24 will however be made based upon actual hours delivered at settings.

6. Legal Implications

- 6.1 The DfE has prescribed the way in which early years providers should be financed for the 2023/24 financial year. These guidelines are set out in the Early Years Entitlement 2023 to 2024 operational guide, and can be found at the following link:

[Early years entitlements: local authority funding operational guide 2023 to 2024 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/early-years-entitlement-2023-to-2024-operational-guide)

- 6.2 The purpose of these arrangements is to help secure greater consistency in the way in which funding is distributed to early years providers. The Council must follow the rules issued by DfE within The School and Early Years Finance (England) Regulations, and the proposed Walsall local early years funding formula sets out how funding will be allocated to early years providers in Walsall within the prescribed arrangements.
- 6.3 Following the meeting of Schools Forum the proposed financial arrangements will be reported to Cabinet for decision on 22nd March 2023, with the outcome communicated with all early years providers in Walsall.

7. School Improvement

- 7.1 As part of making any decisions regarding possible changes to the funding formula, the potential impact on the desired outcomes of the Walsall school improvement programme should be considered.

8. Members eligible to vote

- 8.1 All elected members with voting rights are eligible to vote on this matter.

Appendix A

Proposed Early Years Funding Formula 2023/24

Funding Factor	Unit / Description	2023/24 Rate / Value
Early Years Entitlement for Disadvantaged 2 year olds	Per Hour	£5.51
3 & 4 year olds - Universal Hourly Base rate	Per Hour	£4.86
Deprivation Supplement – mandatory	Fixed annual sum per notional disadvantaged child – derived from numbers recorded on January 2022 census & mapped by postcode to IDACI band A.	£1140 pa p/p
Maintained Nursery Schools Supplement for 3 & 4 YO provision	Per Hour	£3.80hr

Other Early Years Funding

Funding	Description	2023/24 Prescribed Rate
Early Years Pupil Premium (EYPP)	Additional funding to support disadvantaged 3 & 4 year-old children who meet the prescribed criteria	£0.62 per hour of universal free entitlement
Disability Access Fund (DAF)	For children in receipt of disability living allowance – support access to free entitlement for 3 & 4 year-olds.	£828 pa lump sum

Special Education Needs Inclusion Fund (SENIF)

Funding	Description	2023/24 Rate
Special Education Needs Inclusion Fund (SENIF) for 3 & 4 year olds - mandatory	SENIF is targeted funding for children with lower or emerging SEN needs who are attracting 3 & 4 year old free entitlement	£640 per term
Special Education Needs Inclusion Fund (SENIF) for 2 year olds – optional local factor	SENIF is targeted funding for children with lower or emerging SEN needs who are attracting 2 year old free entitlement	£640 per term

Proposed High Needs Local Funding Formula 2023/24 – Including an Overview of the DSG Management Plan

1. Purpose of Report

- 1.1 To provide Schools Forum with a proposed Walsall High Needs Funding Formula for schools supporting pupils with identified special educational needs and disabilities (SEND) for 2023/24, along with an overview of the Dedicated Schools Grant (DSG) Management Plan that has been developed to identify an estimate of future year high needs funding, anticipated costs against that and the direction of travel and actions that may be required to ensure that those costs can be supported within available funding whilst meeting the needs of Walsall children.

2. Recommendation

- 2.1 That Schools Forum notes the proposed Walsall High Needs Funding Formula for 2023/24 and provides any comments and feedback in relation to that.
- 2.2 That Schools Forum recommend the proposed Walsall High Needs Funding Formula to Cabinet, to seek approval and agreement to implement the formula from 1 April 2023.
- 2.3 That Schools Forum notes the work that has been undertaken to develop the Dedicated Schools Grant Management Plan, the position that this identifies and direction of travel and actions that will be required, and that this plan will be subject to ongoing (at least annual) review and update and in-year reporting.

3. High Needs Local Funding Formula 2023/24

- 3.1 The High Needs Funding Formula is the local process that is utilised to allocate the High Needs Block of the Dedicated Schools Grant (DSG) funding that the Council receives, to the providers of support to children with additional needs in the Borough of Walsall.
- 3.2 A full review of the High Needs Funding Formula, supporting financial data and guidance was undertaken during 2020/21 by a working group of Schools Forum (which also included full consultation with all schools affected). This led to the introduction of a new formula in April 2021 which included a new banding model and publication of a 'Walsall Rights 4 SEND' guidance document in support of that.
- 3.3 The High Needs Working Group continued its work during 2021/22, which focussed on supporting the implementation of the revised formula, and 2022/23 where it started work to look at other areas of SEND with a view to potentially recommending future changes, for example, Early Years High Needs Funding, Post 16 High Needs Funding and ARP / PRU funding, however this work is still ongoing and no formal recommendations have been identified for inclusion in the formula for 2023/24.
- 3.4 The only changes that are therefore proposed for 2023/24 are those formally required by the High Needs block regulations and guidance – which are set out below.

Minimum Funding Guarantee

High Needs guidance for 2023/24 requires that a Minimum Funding Guarantee (MFG) of +3% is applied to specialist provision (i.e. Special Schools, PRU's, AP Free Schools etc) using 2021/22 rates as the baseline. The revised rates, incorporating this requirement, are set out at Appendix A.

This requirement does not apply within the High Needs Funding Formula to mainstream schools, therefore rates set out in Appendix A for these schools for 2023/24 are at the same levels as 2022/23. However the Department for Education (DfE) have provided additional funding to mainstream schools for 2023/24 to support with inflationary pressures with both the core schools block funding within DSG seeing a significant increase and the provision of specific additional grant funding for these schools for both 2023/24 and 2024/25.

Passthrough of Additional Grant funding

A new one off Additional Grant for special schools, pupil referral units and AP free schools has also been provided to the authority for 2023/24. The conditions associated with this require the funding to be used to provide an allocation equivalent to 3.4% per place, based on place funding of £10,000 per place plus the average top-up funding for a pupil placement in financial year 2022/23.

The Additional Grant funding allocation is required to be paid as a separate allocation to place and top-up funding in 2023/24. There is also a requirement to consult on the proposed allocation with all schools affected, and this consultation has been carried out prior to reporting the proposal in this report. Final proposed Additional Grant allocations are set out at Appendix A.

4. DSG Management Plan

- 4.1 Nationally a significant number of authorities are experiencing difficulties managing the increasing demand for high needs support against the funding that is available within the High Needs block of DSG. This has resulted in financial pressures for those authorities and the need to develop DSG Management Plans to set out how a financially viable position will be achieved over the medium term.
- 4.2 Whilst Walsall has also seen an increase in demand for these services, it has to date been able to effectively manage those increases within the totality of High Needs funding that has been available to it.
- 4.3 However given the national position, the ongoing increase in demand expected in Walsall, and the fact that the DfE have confirmed that the statutory override (which differentiates DSG funding from other council funding, meaning at present any overspends on DSG do not need to be funded from other council resources) will be removed at the end of the 2025/26 financial year, there is now a requirement for Walsall to also develop and maintain a DSG Management plan. As such work has been undertaken during 2022/23 to develop the baseline for the plan which can then continue to be updated going forward.
- 4.4 In summary a DSG Management plan covers a rolling 5 year period (current financial year plus the next 4 financial years) and sets out the estimated High Needs funding that the authority will receive over that period, the likely demand for high needs support and estimated cost of providing that, and whether that is affordable within the funding that will be available. Where it is not affordable actions to mitigate this position need to be identified and implemented.

4.5 The approach used to develop a DSG Management plan for Walsall is set out below.

4.5.i Estimated High Needs Funding

The actual allocation of funding for the current year, 2022/23, has already been confirmed by the DfE. Additionally the allocation for the next year, 2023/24, has now been confirmed by the DfE.

In relation to 2024/25 the potential funding available has been estimated based on the recent spending review announcement which identified additional investment in to high needs nationally for both 2023/24 and 2024/25.

Finally for the last 2 years of the plan, 2025/26 and 2026/27, an increase in funding of 3% per year has been assumed – this would represent a significant reduction in increases in funding seen in 2023/24 and 2024/25 (circa 50% lower), but the estimate is based on current direction from the DfE as no funding announcements have yet been made for these years.

4.5.ii Review of expected demand

To understand potential demand on the High Needs block the SEN team and Children's data team undertook a joint review of historic SEN data to seek to identify the expected level of Education Health & Care Plan (EHCP) assessments that are estimated to be requested each year, over the 5 year DSG Management Plan period, and of those (again based on historic performance) the amount that would then be formally issued an EHCP.

This exercise showed an estimated increase of 699 children with EHCP's over the DSG Management Plan period, as summarised below:

Provision Type	Additional EHCP Numbers				
	2023/24	2024/25	2025/26	2026/27	Total
Mainstream Schools	73	78	83	88	322
Specialist provision in Mainstream Schools (Additionally Resourced Provision – ARP, or Special Resource Provision - SRP)	30	38	50	66	184
Special Schools	53	40	36	26	155
Independent / Further Education / Out Of Borough	22	16	0	0	39
Total	178	172	169	181	699

Aligned to the council's Walsall Right for Children strategy, where Walsall Council's corporate vision is that 'Inequalities are reduced, and all potential is maximised', and that access to education for children and young people with special educational needs and / or disabilities (SEND) is provided in the setting that best meets those needs, and aligned to the SEND Code of Practice and general presumption in law that mainstream education is the assumed starting position for all children, including children with SEND, the largest areas of expected growth in EHCP demand over the DSG Management Plan period are concentrated in mainstream schools and / or specialist provision within mainstream schools (such as ARP's and SRP's), with lower demand for increases in places expected in special schools.

Whilst a number of ARP's (which are in summary stand alone facilities within mainstream schools to support children with additional needs) have been established in Walsall for some time SRPs (which is a model where children's time is blended between both the main educational provision of the school and also a stand alone facility) have not historically been utilised. However given the estimated increases in EHCP demand and expectation that this growth will be focussed in mainstream settings, work has started with Walsall schools during 2022/23 to begin to develop SRP's, with a small number of schools already piloting these.

In terms of special schools specifically the overall number of new children with EHCP's assumed to require a place in specialist provision between 2022/23 and 2026/27 was 782, however to identify the net number of additional places that will be required in special schools (the 155 set out above) the following areas were taken in to account:

Reconciliation of additional special school places	
Total number of new children with EHCP's requiring a specialist place – 2022/23 – 2026/27	782
Less new places already created from September 2022	(107)
Less expected special school leavers (children turning 16 or 18/19) – 2022/23 – 2026/27	(336)
Less assumed creation of Specialist provision in Mainstream Schools	(184)
Net additional special school places required – 2023/24-2026/27	155

4.5.iii Review of Potential Wider Areas of Cost Increase

Whilst the authority already holds details of the average cost to support children with EHCP's in different settings, and these have been applied to the expected increase in demand to estimate likely costs each year, a further piece of work was also undertaken to understand any further potential areas of cost increase across the DSG Management Plan period. This identified the following:

a. Top Up Rates –

Top Up rates are units of funding paid to education providers to meet the needs of children with EHCP's. To take account of increases in costs for providers between years a proportion of any increase in total High Needs funding is normally required to be allocated to increase top up rates each year (rather than purely being available to support increases in demand).

The minimum increases in top up values required each year are set by the DfE (via the Minimum Funding Guarantee mechanism), and at present these have only been confirmed for 2023/24 (and the detail in relation to that is included in the first part of this report that focusses on the High Needs Funding Formula for 2023/24). As such an assumption has been included within the DSG Management Plan that there will be a requirement to increase top up rates by 3% per year for the period 2024/25 – 2026/27.

b. Looked After Children (LAC) Specialist Education Provision Costs -

Whilst it is a very small cohort, therefore more difficult to understand the potential growth in numbers going forward, there are a small number of Looked After Children that require very high cost specialist education provision each year and the costs required by providers for that have continued to see an increase. As such a further increase in this area of £100k per year (based on review of historic increases in spend over the last 5 years), for each year within the DSG Management Plan, has also been included.

4.5.iv Summary of Key Assumptions

For ease, as summary of the key assumptions included within the DSG Management Plan (in terms of expected funding and expected demand) is included at **Appendix B**.

4.6 **DSG Management Plan Summary Financial Position**

The DSG Management Plan guidelines require the preparation of both an unmitigated position summary (given the assumptions set out above what would the financial position each year be without any further action), and a mitigated position (which identifies a number of potential areas of action and summarises the revised financial position if those actions are implemented). A summary of both positions is set out below, with a more detailed overview provided at **Appendix C**.

DSG Management Plan Unmitigated Position				
Year	DSG High Needs Block Estimated Income (£m)	DSG High Needs Block Estimated Expenditure (£m)	DSG High Needs Block Variance	
			In Year (Surplus) / Deficit (£m)	Cumulative (Surplus) / Deficit (£m)
2022/23	(49.143)	49.143	0.000	0.000
2023/24	(55.826)	54.091	(1.735)	(1.735)
2024/25	(59.144)	56.953	(0.456)	(2.191)
2025/26	(60.918)	60.180	1.453	(0.738)
2026/27	(62.748)	65.593	3.583	2.845

In summary, there is no pressure currently forecast for the 2022/23 financial year, and as expected increases in high needs funding for 2023/24 and 2024/25 are at a higher level (based on October 2022 spending review announcements) these are able to keep pace with the expected increases in demand and costs against the high needs block, so there are also no pressures identified for those years – with in-year surpluses estimated which will be used to support later years in the plan.

However from 2025/26 onwards, where no funding announcements have yet been made for these years and the DfE have directed an assumed increase in funding of 3% per year (circa 50% lower than that expected for 2024/25) then the expected increases in demand and costs for those years are not manageable within the estimated funding, leading to an in year overspend of £1.453m during 2025/26 and a further £3.583m during 2026/27, and resulting in a cumulative overspend across the management plan period of £2.845m.

DSG Management Plan Mitigated Position				
Year	DSG High Needs Block Estimated Income (£m)	DSG High Needs Block Estimated Expenditure (£m)	DSG High Needs Block Variance	
			In Year (Surplus) / Deficit (£m)	Cumulative (Surplus) / Deficit (£m)
2022/23	(49.143)	49.143	0.000	0.000
2023/24	(55.826)	54.091	(1.735)	(1.735)
2024/25	(59.144)	56.953	(0.456)	(2.191)

2025/26	(60.918)	58.848	0.121	(2.070)
2026/27	(62.748)	62.611	1.932	(0.138)

Only one change has been incorporated in to the mitigated plan shown above at present, which is to amend the assumed increase to top up rates for 2025/26 and 2026/27 and for those years rather than estimating a 3% increase to top up rates for all areas the mitigated model assumes that the underlying funding formula that drives top up rates is reviewed (similar to the review that was carried out during 2021/22) and top ups are only increased for targeted areas (based on underlying costs of supporting children in different settings) – resulting in an average 1% increase in top up rate costs overall.

This model would require work in the period ahead of 2025/26 to review the underlying formula and identify, with a high needs working group of Schools Forum (supported by the SEN team and education finance officers), the areas where changes to rates should be targeted, alongside then a full consultation with all schools ahead of any decision to set the formula for 2025/26 onwards – and dependent on the outcome of that process may also require approval from the secretary of state.

However whilst the result of that one change (achieving average top up rates of 1% rather than 3% for 2025/26 and 2026/27) would achieve a cumulative balanced position across the management plan period it would still result in a large in year pressure in 2026/27, of £1.932m, that needs further action to address on an ongoing basis otherwise it will lead to a cumulative overspend on ongoing basis when the plan is rolled forward by another year at the next update.

The plan does show that there is time to consider and deliver further changes during 2023/24 and 2024/25, whilst no financial pressures are estimated, and to support this a range of other action plan areas have been identified and are set out in detail at **Appendix D**. These actions will be subject to further development and the relevant lead officer and initial timescale for development has also been identified in the appendix.

Updates to the Plan

Both the DSG Management Plan summary, and development and delivery of mitigating actions, will be subject to ongoing (at least annual) review and update of both the financial position and assumptions, with in-year reporting to Schools Forum and Cabinet also taking place.

5. Financial implications

- 5.1 In terms of the proposed high needs funding formula for 2023/24, this is estimated to be affordable within the totality of funding that is available within the High Needs Block of DSG that is paid to the authority.
- 5.2 With regard to the DSG Management Plan the position that has been developed identifies that, due to estimated higher increases in funding in 2023/24 and 2024/25 that there will be underspends in these years that can be carried forward to support the later years of the plan. However without further action (as funding increases are currently assumed to reduce in 2025/26 and 2026/27) there will be both an in-year pressure of £3.583m and cumulative pressure of £2.845m by the end of 2026/27.

- 5.3 As such a range of mitigating actions has been identified to address this and development and delivery of these, alongside ongoing updates to the DSG Management Plan summary overall will be subject to ongoing (at least annual) review and update, with in-year reporting to Schools Forum and Cabinet also taking place.

6. Legal implications

- 6.1 The DfE has prescribed the way in which schools should be financed for the 2023/24 financial year. These guidelines are set out in the Schools Revenue Funding 2023 to 2024 operational guide. The purpose of these arrangements is to help secure greater consistency in the way in which high needs funding is distributed to schools. The Council is bound to adhere to the rules issued by DfE.
- 6.2 With regard to the position identified within the DSG Management Plan, as set out within the report, the current statutory override (which differentiates DSG funding from other council funding, meaning at present any overspends on DSG do not need to be funded from other council resources) will be removed at the end of the 2025/26 financial year. As such the development of a DSG Management Plan, with ongoing monitoring and delivery of identified actions will support the management of financial risks associated with this for both schools and the authority.

7. School Improvement

- 7.1 As part of making any decisions regarding possible changes to the high needs funding formula consideration should be made of the potential impact on the desired outcomes of the Walsall school improvement programme. The outcomes for pupils with SEND seek to close the gap between themselves and other pupils in terms of both progress and attainment, to enable them to have the best chances as they move into adulthood.

8. Members eligible to vote

- 8.1 The School Forum roles and responsibilities document clarifies that Schools Forum should provide views on and inform any changes to high needs funding arrangements. This report therefore seeks Schools Forum's views and requests their recommendation of the proposed high needs local funding formula for 2023/24 for approval. All eligible members with voting rights are able to vote on that recommendation.

Proposed High Needs Top-up Rates 2023/24

SEND Band	Special Schools High Needs Top-up Rates 2023/24 £	Mainstream Schools High Needs Top-up Rates 2023/24 £
SEMH Band 1,2 & 3 – funded by school budget	n/a	n/a
SEMH Band 4	n/a	4,181
SEMH Band 5	n/a	6,847
SEMH Band 6	17,100	10,392
SEMH Band 7	22,217	17,075
C&L Band 1,2 & 3 – funded by school budget	n/a	n/a
C&L Band 4	n/a	3,095
C&L Band 5	n/a	4,611
C&L Band 6	6,373	11,800
C&L Band 7	14,935	15,312
C&L Band 8	25,853	20,388
SLCN Band 1,2 & 3 – funded by school budget	n/a	n/a
SLCN Band 4	n/a	3,326
SLCN Band 5	n/a	6,891
HI Band 1,2 & 3 – funded by school budget	n/a	n/a
HI Band 4	n/a	4,611
HI Band 5	n/a	6,847
HI Band 6	10,503	9,923
HI Band 7	14,936	14,471
VI Band 1,2 & 3 – funded by school budget	n/a	n/a
VI Band 4	n/a	5,375
VI Band 5	n/a	8,407
VI Band 6	n/a	15,006
VI Band 7	n/a	17,432
MSI Band 1,2 & 3 – funded by school budget	n/a	n/a
MSI Band 4	n/a	6,216
MSI Band 5	n/a	10,764
MSI Band 6	21,630	16,643
MSI Band 7	36,990	18,159
Physical Band 1,2&3 – funded by school budget	n/a	n/a
Physical Band 4	n/a	3,791
Physical Band 5	n/a	6,745
Physical Band 6	20,512	13,718
Physical Band 7	24,150	18,432

Small Special School Top-up:

A top-up to be applied only to specials schools with less than 50 pupils to support fixed costs.

Small special school	£1,948 per pupil pro rata to weeks attending
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Top-Up Rate for Pupil Referral Units:

	PRU Top-up rate 2023/24 £ pa
New Leaf	10,255
Shepwell	8,933

Top-Up Rates for Additionally Resourced Provision (ARP) / Specialist Resource Provision (SRP) in Mainstream Schools – 2023/24 for places filled on October 2022 census:

	ARP Top-up rates 2023/24 for Filled places £ pa
Speech & Language -primary	3,171
Speech & Language -secondary	1,441
Dyslexia - secondary	1,436
Visual Impaired - primary	14,380
Physical Disability - primary	10,022
Physical Disability - secondary	8,291
Autism - primary	9,832
Autism - secondary	8,102

Top-Up Rates for Additionally Resourced Provision (ARP) / Specialist Resource Provision (SRP) in Mainstream Schools – 2023/24 for places unfilled on October 2022 census:

	ARP Top-up rates 2023/24 for Un-Filled places £ pa
Speech & Language -primary	2,909
Speech & Language -secondary	2,909
Dyslexia - secondary	2,904
Visual Impaired - primary	14,118
Physical Disability - primary	9,760
Physical Disability - secondary	9,760
Autism - primary	9,570
Autism - secondary	9,570

Teachers' Pay & Pension historic costs – rates for Alternative Provision Free Schools

Funding	Period	Rate per place
Teachers' Pay	April to August	£72.91
	September to March	£102.08
Teachers' Pension	April to August	£202.06
	September to March	£282.89

Payments will be based on the actual published place number for the relevant period, less any places already being paid by the authority via top-up.

Additional Grant Funding for Special Schools, Pupil Referrals Unit and AP Free Schools

School Name	Additional Grant Funding 2023/24 £
Specials:	
Castle	132,425
Elmwood	75,477
Jane Lane	107,730
Mary Elliot	140,889
Oakwood	130,619
Old Hall	101,113
Phoenix	41,341
PRU's:	
New Leaf	29,498
Shepwell	38,467
AP Free School:	
The Ladder School	30,302
Total	827,861

Summary of DSG Management Plan Key Assumptions

Plan Area	Assumption
Funding	<ul style="list-style-type: none"> • 2022/23 – based on confirmed allocation • 2023/24 – based on confirmed allocation • 2024/25 – based on estimated allocation taking account of the October 2022 spending review and indicative increases in high needs funding nationally • 2025/26 and 2026/27 – based on an assumed 3% increase in funding per year (in line with direction from DfE for planning purposes)
Demand	<ul style="list-style-type: none"> • Mainstream schools – increase in demand of 322 children with EHCPs between 2023/24 and 2026/27 • Specialist provision in Mainstream Schools – increase in demand of 184 children with EHCPs between 2023/24 and 2026/27 • Special Schools – Net increase in places required of 339 children with EHCPs between 2023/24 and 2026/27 • Independent / Further Education / Out Of Borough - increase in demand of 39 children with EHCPs between 2023/24 and 2026/27
Costs	<ul style="list-style-type: none"> • Top Up Increases – Assumed at 3% per year 2024/25 – 2026/27 • LAC Specialist Education Provision Costs – Assumed increase of £100k per year

DSG Management Plan Detailed Summaries

DSG Management Plan Unmitigated Position														
Year	Place Numbers						Income			Expenditure			Variance	
	Mainstream	Special	ARP/SRP	PRU/AP	Independent FE College	Total	HNB Allocation before Deductions (£m)	HNB Deductions (£m)	HNB Allocation after Deductions (£m)	EHCP Led (£m)	Non EHCP (£m)	Total (£m)	In year (Surplus)/ Deficit (£m)	Cumulative (Surplus)/ Deficit (£m)
2022/23	1164	876	83	158	612	2892	(50.713)	1.570	(49.143)	42.775	6.368	49.143	0.000	0.000
2023/24	1236	928	113	158	634	3071	(57.398)	1.572	(55.826)	47.187	6.904	54.091	(1.735)	(1.735)
2024/25	1314	969	151	158	651	3242	(60.841)	1.698	(59.144)	51.659	5.293	56.953	(0.456)	(2.191)
2025/26	1397	1004	201	158	651	3411	(62.752)	1.834	(60.918)	55.219	4.961	60.180	1.453	(0.738)
2026/27	1485	1031	267	158	651	3592	(64.729)	1.980	(62.748)	59.053	6.540	65.593	3.583	2.845

DSG Management Plan Mitigated Position														
Year	Place Numbers						Income			Expenditure			Variance	
	Mainstream	Special	ARP/SRP	PRU/AP	Independent FE College	Total	HNB Allocation before Deductions (£m)	HNB Deductions (£m)	HNB Allocation after Deductions (£m)	EHCP Led (£m)	Non EHCP (£m)	Total (£m)	In year (Surplus)/ Deficit (£m)	Cumulative (Surplus)/ Deficit (£m)
2022/23	1164	876	83	158	612	2892	(50.713)	1.570	(49.143)	42.775	6.368	49.143	0.000	0.000
2023/24	1236	928	113	158	634	3071	(57.398)	1.572	(55.826)	47.187	6.904	54.091	(1.735)	(1.735)
2024/25	1314	969	151	158	651	3242	(60.841)	1.698	(59.144)	51.659	5.293	56.953	(0.456)	(2.191)
2025/26	1397	1004	201	158	651	3411	(62.752)	1.834	(60.918)	53.887	4.961	58.848	0.121	(2.070)
2026/27	1485	1031	267	158	651	3592	(64.729)	1.980	(62.748)	57.403	5.208	62.611	1.932	(0.138)

Summary of DSG Management Plan Mitigating Action Areas

DSG Management Plan Mitigating Action Areas				
Ref.	Action	Description	Lead	Initial Timescale
DMP1	Refresh and update of estimated increases in demand	Annual refresh of estimated future year demand for EHCP's.	SEN team and Childrens Data Team	Annually
DMP2	Lobby government for sustained increases to high needs funding	Liaison with Schools Forum and Cabinet / Council to seek support to formally lobby the government for sustained increases to high needs funding in 2025/26 and 2026/27 (and beyond).	Director Access & Inclusion	During 2024/25 (to inform next spending review)
DMP3	Review of High Needs Funding formula	Detailed review of high needs funding formula ahead of 2025/26 financial year to seek to identify and develop targeted increases to top up rates (rather than blanket 3% increase) – including formal consultation process.	High Needs working group of Schools Forum	During 2024/25
DMP4	Continued development of SRP's	Continued work with mainstream schools to establish further SRP places required to meet expected demand.	Head of Access	Ongoing as part of Capital Programme
DMP5	Creation of additional special school places	Continued work with special schools to establish further places required to meet expected demand.	Head of Access	Ongoing as part of Capital Programme
DMP6	Review of assumed increases in Independent / FE / OOB	Work to reduce current assumed increases in demand for Independent / Further Education / Out Of Borough places by seeking to support more of those children within the borough where possible.	Head of Access	Ongoing as part of DMP8

DMP7	Identify the qualitative impact of central inclusion and Early Years High Needs work	There is currently a significant proportion of central high needs funding allocated to both early years high needs support and also inclusion support, in addition to top up funding paid directly to providers. However there is little qualitative information available at present to confirm the impact that this funding delivers (e.g. does it reduce the number of children who require ongoing EHCP support). Qualitative information will therefore be developed further to seek to understand if this spend delivers value for money or if there is a need to redirect this funding elsewhere within the high needs block.	Head of Inclusion and Specialist Services Manager	During 2023/24 and 2024/25
DMP8	Continued communication of direction of travel and vision of support for children with special educational needs and / or disabilities	Seek continued communication of the direction of travel and vision and increased buy in from schools and parents so that the expectation is that children are supported within Walsall in the setting that best meets their needs rather than an escalation to more expensive specialist provision or independent / out of borough placements.	Head of Access	During 2023/24 and 2024/25
DMP9	Review mechanism for independent place costs	The costs of supporting children in independent schools (whilst a small cohort of children) is on average higher than other settings and as it is not expected that children currently in these places will move, the authority needs to ensure it has a robust process in place to review existing costs on an ongoing basis to ensure it continues to receive value for money.	Children's Commissioning Team and Head of Inclusion	Starting in 2023/24 and ongoing across the management plan period

DMP10	Potential transfer of funding from other DSG areas	<p>DSG guidance does allow the authority to seek to transfer up to 0.5% of the Schools Block funding of DSG (the funding that mainstream schools receive to provide support to all children in mainstream settings) to the High Needs block to support with pressures in that area.</p> <p>Based on the Schools Block allocation for 2023/24 this would equate to circa £1.324m per year, but to date the authority has not sought to use this flexibility, as it has not been needed and also as it would result in a financial impact (reduced funding) for mainstream schools.</p> <p>However if there is limited progress / support with the delivery of DMP4 and DMP8 then the authority may need to review the need to utilise a transfer of funding.</p>	Director Access & Inclusion	Not assumed to be required at present if other actions are delivered – will be reviewed across the management plan period alongside delivery of wider actions
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WALSALL

SCHOOLS FORUM

FORWARD PLAN OF DECISIONS

The forward plan sets out decisions which the Schools Forum intend to take over the following 4 months. Preparation of the forward plan helps the Schools Forum to programme its work. The purpose of the forward plan is to give plenty of notice and an opportunity for consultation on the issues to be discussed. The plan is updated in the middle of each month with the period of the plan being rolled forward by one month and republished. The plan is available for public inspection on the Council's website at www.walsall.gov.uk. Copies of the plan can be obtained from Neil Picken, Democratic Services, Walsall MBC, Council House, Lichfield Street, Walsall, WS1 1TW, 01922 654369 or e-mail neil.picken@walsall.gov.uk. Please note that the decision dates are indicative and are subject to change. Please contact the above addressee if you wish to check the date for a particular item.

The Schools Forum agenda and reports are available for inspection by the public 7 days prior to the meeting of the Forum. The papers are available on the Council's website referred to above shortly before the meeting. Background papers are listed on each report submitted to the Schools Forum and members of the public are entitled to see these documents unless they are confidential. The report also contains the name and telephone number of a contact officer. These details can also be found in the forward plan.

Meetings of the Schools Forum are held on Microsoft Teams and live streamed online and available to the public to view. Occasionally there are items included on the agenda which are confidential and for those items the public will be asked to leave the meeting.

www.walsall.gov.uk

**FORWARD PLAN OF DECISIONS TO BE TAKEN
BY SCHOOLS FORUM
FROM SEPTEMBER, 2022**

DECISION TO BE CONSIDERED	BACKGROUND PAPERS AND CONTACT OFFICER	DATE ITEM TO BE CONSIDERED
School improvement working group	Chair	Standing Item for each meeting
Election of Chair and Vice Chair for 2022/23	Democratic Services Officer	September 2022
School Music Service	Walsall Music Education Hub & Service. Walsall Arena & Arts Centre (Forests Arts Centre)	September, 2022
Update on Local Government Pension Scheme Charges (if required)	Finance Manager	September, 2022
Specialist Support Services	Head Teachers – North Star Federation/Short Heath Federation	September, 2022
School improvement working group	Chair	October, 2022
Proposed Mainstream Schools Local Funding Formula 2023/24	Finance Manager	October, 2022
Maintained Schools Delegation	Finance Manager	October, 2022

Review of Maintained Schools Balances 2021/22	Finance Manager	October, 2022
Review of Dedicated Schools Grant – update on 2022/23 Forecast Position	Finance Manager	October, 2022
Disapplication Request	Finance Manager	October, 2022
Proposed Mainstream Local Funding Formula 2023/24	Finance Manager	December, 2022
School improvement working group	Chair	January, 2023
Mainstream Funding Formula 2023/24	Finance Manager	January, 2023
Central Expenditure Budgets 2023/24	Finance Manager	January, 2023
Early Years Funding Formula	Finance Manager	March, 2023
High Needs Funding Formula (Outcome)	Finance Manager	March, 2023
School improvement working group	Chair	March, 2023
Walsall Learning Alliance – termly update	Mrs C. Draper , Primary Head Teacher, Short Heath Federation	March 2023

Review of Schools Forum Membership	Democratic Services Officer	June, 2023
School improvement working group	Chair	June, 2023
Schools Forum Annual Report	Democratic Services Officer	June, 2023
Dates for 2023/24 meetings	Democratic Services Officer	June, 2023