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SOUTHEND-ON-SEA BOROUGH COUNCIL

Education Board

Date: Tuesday, 19th October, 2021

Time: 8.15 am

Place: Darwin Room - Tickfield Centre

Contact: Robert Harris

Email: committeesection@southend.gov.uk

AGENDA

Agenda	Item	Lead	Time
1.	Apologies for absence	RH	5mins
2.	Minutes of the meeting held on Tuesday 22 nd June 2021 Minutes attached	RH	5mins
3.	Matters arising (not covered elsewhere on the agenda)	Chair	10mins
4.	Education Board Membership and Vacancies Verbal report (no papers)	RH	10mins
	<u>Schools Forum Matters</u>		
5.	Dedicated Schools Grant 202223 Budget Planning and 202122 Budget Update Report for decision attached	PG	30mins
	<u>Education Board Matters</u>		
7.	Matters of the Moment Verbal report from Director of Education and Early Years (no papers)	BM	20mins

8.	<p>Report back from Sub Groups</p> <p>(a) Resources Sub-Group held on 5th October 2021 – Minutes attached</p> <p>(b) School Performance Sub-Group held on 12th July and 6th October 2021 – Minutes attached</p>	Chairs	15mins
9.	<p>Any other business (to be notified to the Chair/Clerk prior to the start of the meeting)</p>	ALL	10mins
10.	<p>Date and times of future meetings</p> <p>Wednesday 15th December 2021 – 8.15am – Tickfield Centre</p> <p>Tuesday 18th January 2022 – 8.15am – Tickfield Centre</p> <p>Tuesday 15th March 2022 – 8.15am – Tickfield Centre</p> <p>Tuesday 21st June – 8.15am – Tickfield Centre</p>		

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SOUTHEND-ON-SEA BOROUGH COUNCIL

Meeting of Education Board

Date: Tuesday, 22nd June, 2021

Place: MS Teams

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Present: Jane Ladner (Chair) – Southend High School for Girls (Governor)
Dr Robin Bevan (Vice-Chair) – Southend High School for Boys (Headteacher)
Julia Jones – Barons Court School (Headteacher)
Jim Johnson – Edwards Hall Primary (Headteacher)
Stuart Reynolds - Southchurch High School (Headteacher)
Dr Paul Hayman - Westcliff High School for Girls (Headteacher)
Stephen Tollworthy - Shoeburyness High School (Governor)
Darren Woollard - Blenheim Primary School (Headteacher)
Lisa Clark - Hamstel Infant (Headteacher)
Mark Jordan – Victory Park Academy (PRU)
Anthony McGarel - South Essex College
Vicky Wright - Professional Association for Childcare & Early Years
Jackie Mullan - St Christophers (SEN Trust)
Lesley Yelland - Essex Pre-School Learning Alliance (Early Years)
Amanda Kipps - YMCA
Jerry Glazier – Trade Unions
Bev Williams – CEO MAT Group representative (non-voting)

In Attendance: P Grout, E Hammans, R Harris, B Martin, C Braun and M Marks and G Bloom

Start/End Time: 8.15 - 10.06 am

1 Apologies for absence

Apologies for absence were received from D. Allen (Academy Primary Governor) and L. Thorne (YMCA – Alternative Provision).

2 Minutes of the meeting held on 15th December 2021

Resolved:

That the minutes of the meeting held on 15th December 2021 be confirmed as a correct record.

3 Matters arising (not covered elsewhere on the Agenda)

(a) Public Duties Fund

The Board discussed a number of matters relating to the Public Duties Fund covering administration of the fund and take-up by Academies. The Board noted that a letter was sent to all Academies promoting the Public Duties Fund and there was a low take-up of the scheme (6 Academies had signed-up to the fund

in 2019/20 and only 1 Academy in 2020/21). It was reiterated that joining the scheme was voluntary/optional for Academies.

Brin also advised that the administration of the fund was not sustainable given additional low take up and proposals would be considered by the Resources Sub-Group and brought back to the Board for consideration.

4 Education Board Membership, Vacancies, etc

The Board received a verbal update from the Principal Democratic Services Officer covering the current membership and vacancies. There continues to be one vacancy in the maintained primary sector, one vacancy in the academy secondary sector and one in the Academy primary sector. These vacancies will be re-advertised/promoted within the relevant sectors with the intention to fill them as soon as practicable.

The Board also noted that this was the last meeting for Gerry Glazier and Paul Hayman and placed on record their thanks and appreciation for their significant contributions to the Board and the Borough and wished them well in the future.

Resolved:

1. That the current membership and vacancies be noted.
2. That Gerry Glazier and Paul Hayman be thanked for their significant contributions and the Board's best wishes be formally recorded.

5 Dedicated Schools Grant 2020/21 Final Outturn

The Board considered a report from the Senior Finance Business Support Officer providing an update on the Dedicated Schools Grant (DSG) final outturn for the 2020/21 schools budget, high needs, early years and centrally retained.

The Board discussed the report and noted positively that the DSG funding position was in a healthy and sustainable position. The Board stressed the need for a robust policy to manage the allocation of reserves and must focus on genuine educational improvement and the specific needs. The Resources Sub-Group will consider a report setting out proposals on how the funds could be utilised and bring back recommendations to the Board.

Resolved:

1. That the final 2020/21 outturn, be noted.
2. That the subsequent DSG reserve balances shown for each funding block to be carried forward into 2021/22, as referenced in paragraph 4.20 of the report, be approved.

6 Education Health Care Plan revised top up banding scheme from September 2021

The Board considered a report of the Head of SEND seeking approval to the implementation of the proposed Banding Scheme to deliver high needs top up funding to all Southend schools effective from September 2021.

The Board discussed the report with a specific focus on the need to support Early Years financially. The Board noted that the banding descriptors for Early Years were currently being developed.

The Board asked that the SEND banding descriptors (MATRIX GRID) be shared with Schools.

Resolved:

1. That the banding scheme for all schools be implemented, recognising the need for change and the drive to ensure consistent decision making which is open and transparent.
- 2 That it be noted that the new banding scheme combined with a 2% uplift to the rates from September 2021 has been applied within the following subsequent "DSG High Needs Block detailed budget allocations for 2021/22" report.

7 Dedicated Schools Grant High Needs Detailed Budget Allocation 2021/22

The Board considered a report of the Senior Finance Business Partner presenting the High Need's DSG (Dedicated Schools Grant) Block detailed budget allocations for 2021/22.

Resolved:

1. That the revised flexible place fund allocation scheme from September 2021, as referenced in paragraph 7.2 of the report, be adopted.
2. That the in borough high need top up funding rates awarded to special schools, enhanced mainstream units and mainstream schools be approved and adopted on the new and revised banded model from September 2021, including a 2.0% uplift applied to those new rates, as referenced in paragraph 7.3, 7.4 and 8.2 of the report.
3. That in view that there has been no recent increase in top up rates passed over to the Pupil Referral unit, the top up rates be uplifted by 4.0% from September 2021, as referenced in Paragraph 7.6 of the report.
4. That, in consideration of recommendations 1 to 3 above, combined with the budget requirements as presented in the report, the detailed High need budget allocations for 2021/22, be approved and adopted.
5. That it be noted that additional DSG funding for the former and separate teacher pay and pension grants will now be passported through to the Special Schools and Alternative Provision settings from April 21, as referenced in paragraph 7.5 of the report.

8 SEND Visit Feedback

The Board received verbal update from the Director of Education providing feedback from the SEND revisit. The revisit was undertaken by 4 Inspectors via a desktop exercise and three days on site and examined/reviewed progress against the areas set out in the Written Statement of Action (WSOA).

Resolved:

That the update on the SEND revisit, be noted.

9 Education Response to Covid-19

The Board received a verbal update from the Director of Learning on the education response to the COVID-19 pandemic and the current situation in the Borough. The Director also extended his appreciation and thanks to all schools for their support and work during the pandemic.

Resolved:

That the update be noted.

10 Report back from Sub Groups

The Board received the following Sub Group minutes for information:

- (a) Resources S.G. held 8th June 2021;
- (b) School Performance S.G. held 11th May 2021; and
- (c) Vulnerable Learners S.G. held 27th May 2021

During consideration of the minutes the Board suggested that a review of the membership and attendance should take place for each Sub Group to ensure that there was appropriate representation.

Resolved:

That the minutes of the Sub Groups' be noted and their membership and attendance be reviewed.

11 Any other business

There was no other business conducted at this meeting.

12 Date and time of future meetings

To be advised. The schedule of meetings for the 2021/22 academic year will be circulated as soon as possible. The first meeting will take place in October 2021.

Chair: _____

Southend-on-Sea Borough Council

Executive Director of Finance and Resources
Executive Director of Children and Public Health

To
Education Board

On
19th October 2021

Report prepared by:
Paul Grout, Senior Finance Business Partner

Agenda
Item No.

5

Dedicated School Grant (DSG) 2022/23 budget planning and 2021/22 budget update

1 Purpose of Report

- 1.1 To update the Education Board (EB) on DSG budget planning for 2022/23 following the Department for Education (DfE) July 2021 School funding announcements.
- 1.2 To seek to agree a decision in principle with regard to the setting of our local 2022/23 Individual School Block funding allocations per pupil.
- 1.3 To update the EB on the latest DSG budget for 2021/22 following the applied annual DfE July 2021 funding update changes.
- 1.4 To formally adopt a DSG reserve strategy for balances held.

2 Recommendations

Education Board are asked to agree:

- 2.1 With regard to individual school's budget (ISB) planning for 2022/23, to continue on the trajectory of adopting the principles of the National Funding Formulae (NFF). (As referenced in 5.1 through to 5.5). And therefore;
 - 2.1.1 Any mainstream school that attracts their core NFF pupil led funding factors (i.e. with no MFG or funding floor protections applied), to benefit from the full NFF applied circa 3% increase to those core funding factors per pupil.
 - 2.1.2 All remaining mainstream schools whose per 2021/22 per pupil led funding rates are either above the revised NFF mandatory 2022/23 minimum funding amounts per pupil or core NFF funding rate per pupil as referenced in 2.1.1, will receive the same NFF maximum allowable 2% uplift per pupil.

- 2.2 To formally adopt the approach of recommended minimum balances held in DSG reserves and the approach of one off use of reserve balances where they are above those minimum levels (As referenced in 11.7 and 11.8).

3 Background

2021/22

- 3.1 The updated DSG budget for 2021/22 follows the annual July 2021 release from the DfE of the latest 2020/21 DSG funding block allocations at a Local Authority (LA) level, where funding changes have been applied to high needs, and as yet, we await any changes in relation to the early years block funding for 2021/22.

2022/23

- 3.2 The DSG budget planning for 2022/23 follows both the original September 2019 Government headline announcements on the future of schools funding, and continued announcement by the DfE in July 2021 and subsequent DfE's release of the "Schools revenue funding 2022 to 2023 operational guide" used to help guide LA's and their Schools Forums/Education Boards to plan the local implementation of the funding system.
- 3.3 2022 to 2023 will also now be the fifth year of the National Funding Formulae (NFF) reforms and is the funding basis for setting individual school block allocations. However, it does still remain a local decision with the agreement of School Forum on the final school per pupil rates set at an individual school level (within minimum guarantee protections) with the exception now of the minimum per pupil funding rates which is a mandatory funding factor.
- 3.4 The Government have continued to re-affirm their position of intention to move to a Hard NFF, whereby individual school budgets would be set through one single national formula rather than local funding formulae. In July 2021, the DfE published a consultation on proposals for completing these funding reforms, which also proposes that from 2023 to 2024 all local authorities will be required to bring their own formulae closer to the single national formula to smooth the transition. The Government have also sought views in that consultation in relation to moving annual funding of maintained schools to an academic year (mirroring an academy school funding year) as oppose their current april to march financial funding year. Maintained schools therefore need to be very minded of this change in both budget planning and administration should this change occur.
- 3.5 In terms of the NFF funding formulae itself, it must be noted and continually commended that our own LA and Education Board has positioned itself well over the last five years to align our School DSG resources to the principles of the NFF (which started in 2017/18) and support those principles, it therefore would now simply make no sense and dispute school budget planning to move away from these principles. There is also however, now, very limited options to be able to deviate away from those principles given the built in NFF Minimum funding guarantee protections regardless.

- 3.6 It is also reported, that most LAs are now adopting the principles of the NFF in their individual school funding formula.
- 3.7 Whilst, 2022/23 funding headlines continue to be welcome news for both the Schools and High Needs block. The DfE, as previously reported and suspected have confirmed that the DSG Central Block Historic commitment funding element will be unwinding further by another 20% from the 2021/22 baseline. 2022/23 is now the 3rd annual funding reduction of 20% which was firstly applied in 2020/21 as part of the wider NFF reforms. The DfE have also repeated their intention that this funding will continue to unwind until all gone and likely by time of implementation of the Hard NFF.
- 3.8 The DfE have not yet made any announcements in relation to Early Years funding for 2022/23. The DfE state the guidance will be published in the Autumn 2021 term following which these announcements will then be shared in the next EB DSG December 2022/23 budget planning paper.

4 Dedicated Schools Grant 2022/23 budget planning and 2021/22 budget update

Foreword

- 4.1 In September 2019, the Government and the DfE released a statement, “that the funding for schools and high needs compared to 2019-20, will nationally rise by £2.6 billion for 2020-21, £4.8 billion for 2021-22, and £7.1 billion for 2022-23”. Which is ofcourse a welcome announcement and 2022/23 itself is now the final year of that three year announcement, but we remain minded on a national and local basis this is on the back drop of significant national pressures on high needs funding, schools that have been struggling financially alongside further and justifiable required increases in teacher salaries and pension contributions.
- 4.2 The 2022/23 indicative DSG funding allocations at a total local level are presented alongside the detail of the latest 2021/21 Budget allocations as shown in “Appendix 1 – DSG Latest 2021/22 budget and Indicative budget 2022/23”. The DfE total funding allocation for 2021/22 DSG resources is now £171.603M and the total indicative 2022/23 allocation is £176.524M. This represents a total indicative increase of £4.921M from 2021/22 applied across the Schools Block of £2.780M, High Needs block of £2.261M and a net reduction of (£0.121M) to the Central Block.
- 4.3 All the applicable changes to the updated 2021/22 DSG budget, and basis of the indicative 2022/23 budget allocations are explained within each DSG block of this paper.

5 Schools Block – Individual School Block (ISB) allocations 2022/23

- 5.1 The 2022/23 indicative DfE allocations published contain the actual 2022/23 primary unit of funding (PUF) and secondary unit of funding (SUF) that the DfE will use to calculate each LA's final school block allocation. And as repeated annually, they will then also issue the updated and final total 2022/23 school block funding allocations in December 2021 based on the latest pupils numbers and adjusted funding factors recorded through the October 2021 school census.
- 5.2 The following are the key headlines related to mainstream school funding for 2022/23 released by the DfE in July 2021:
- 5.2.1 The minimum per pupil levels will be set at £4,265 for primary schools (£4,180 in 2021/22) and for secondary schools £5,525 (£5,415 in 2021/22), both with an equivalent circa 2% increase from 2021/22. And to simply remind, from 2020/21 the minimum amounts per pupil are also now a mandatory funding factor.
 - 5.2.2 Where schools are attracting their underlying core NFF allocations, the NFF has built in an increase of circa 3.0% from the 2021/22 Pupil led funding factors: basic entitlement, free school meals at any time in the last 6 years, income deprivation affecting children index (IDACI). Lower prior attainment (LPA), English as an additional language (EAL), a circa 2% increase on Free Schools Meals (FSM) from 2021/22, and separately a 3.0% increase on the lump sum from 2021/22.
 - 5.2.3 And for those Schools whose per pupil led funding rate is already above both 5.2.1 and 5.2.2, the NFF funding floor per pupil led rate has been set at a 2.0% increase from their 2021/22 per pupil led base line.
 - 5.2.4 A NFF 0% increase on premises factors, except for PFI which has increased by RPIX.
 - 5.2.5 The per pupil led Minimum MFG (Minimum Funding Guarantee) protection from 2021/22, can be set between a +0.5% and + 2% per pupil.
 - 5.2.6 LAs continue to be able to propose a transfer up to 0.5% from their schools block to other DSG blocks with school forum approval. And a disapplication request to the DfE continues to be required for any transfer request above 0.5% or any amount without school forum approval.
 - 5.2.7 The government have re-confirmed and now consulting on final plans to move to a hard NFF for Individual School budgets.
- 5.3 Now given that our local Education Board has been a strong adopter from the start of the NFF reforms (from 2017/18, 5 years ago) and that the government's strong intention remains to move to a single 'hard' national funding formula to determine every school's budget, there is therefore no foreseeable reason why our EB would now choose to move away from these NFF principles. We must also be minded, as listed above in 5.2.1 to 5.2.3, no school will lose funding on a per pupil basis, as the NFF has a built in an increase of 2% on minimum amounts per pupil, a 3% uplift to the selected core underlying funding factors

including basic entitlement, and for all remaining schools already above their core NFF funding amount or minimum amount per pupil have a built in 2% increase from their 2021/22 per pupil led funding baseline. This therefore represents a positive funding increase per pupil for all schools.

- 5.4 It is therefore recommended (excluding the minimum funding amounts per pupil which is a compulsory factor regardless), that for 2022/23 the Education Board continue to fully adopt the principles of the NFF as listed in 5.2.1 to 5.2.3.
- 5.5 In view of the recommendation of 5.4, using the 2021/22 School block data set, the illustrative 2022/23 school level per pupil led rates are shown in Appendix 2 including a % increase comparison to their 2021/22 base line. It must remain caveated that with regard to the applied 2022/23 3% increase on the core underlying NFF funding rates and in accordance with the annual funding cycle, it will only be possible to know the actual final per pupil led rate for those applicable schools once the DfE have released in late December 2021 the updated School Block data set for 2022/23 (which is based on the October 2021 school census). **And please note** - the then actual final 2022/23 individual school allocations will be subsequently shown in the January 2022 EB DSG paper which will include the updated numbers of pupils on roll at each school (based on the DfE's October 2021 census) multiplied by these now proposed 2022/23 per pupil led funding rates to form the final 2022/23 funding allocations.

6 Schools Block – Centrally retained 2022/23

- 6.1 The following is the key headline, released by the DfE in relation to the growth fund for 2022/23;
- 6.1.1 For 2022 to 2023, growth funding will be calculated using the same methodology as in 2021 to 2022, based on the growth in pupil number between the October 2020 and October 2021 censuses.
- 6.1.2 Local authorities that received growth funding protection in 2021 to 2022 have continued to receive protection in 2022 to 2023, meaning the maximum reduction in growth funding for these local authorities will be set at -0.5% of their total DSG schools block allocation in 2021 to 2022.
- 6.2 The 2022 to 2023 actual DfE DSG growth funding amount won't be known until December 2021 once the DfE have processed the differences between the two October censuses.
- 6.3 For Southend, we are not expected to meet the need for growth funding protection as we are now experiencing the growth in our secondary sector, and as previously agreed through EB:
- 6.3.1 In the March 2019 EB DSG Growth paper. Southend has an affordable funding plan to support growth to schools over the life of the expected growth within the funding available. Which includes declared minimum funding rates which can be set as necessary.
- 6.3.2 And as per the timings of announcements as agreed in the December 2019 EB DSG budget planning paper, final growth rates for 2022/23 will be

declared in the January 2022 EB DSG budget paper (so once the final funding DfE allocations are known for 2022/23), alongside any potential and affordable increase adjustment for the rates currently applied in 2021/22.

7 Schools Block – De-delegated 2022/23

- 7.1 In accordance with the annual funding cycle, any proposed amounts for 2022/23 de-delegation consideration (Voting rights maintained schools only), will be presented to the EB in the December 2021 EB DSG paper. And it remains minded, the only current approved funding item for delegation in 2021/22 is staff cost public duties claims allowing further buy in from Academy schools to support and therefore also be eligible for those claims.

8 Early Years Block

2021/22 Budget Update

- 8.1 Usually by October Early Years DSG funding into the LA would have been updated for any final funding final adjustment relating to the previous 2020/21 financial year which also results in a subsequent update for a revised indicative budget allocation for the current 2021/22 financial year.
- 8.2 Now due to the Covid-19 pandemic, the DfE have changed the basis of funding a revised indicative 2021/22 year from the usual spring January 2020 and spring January 2021 early years censuses, to now funding that will be determined using the spring censuses but also now including both an additional formal early years head count census for the Summer 2021 and Autumn 2021 terms. Once the DfE, have processed these censuses the DSG funding into the LA will then be adjusted for each of those respective terms. The DfE have made these adjustments so in effect they are now funding actually termly headcounts, as oppose, the traditional January spring term census effectively used as a basis to represent an average for the year.
- 8.3 In terms of current timings of 2021/22 budget updates, there are therefore no further funding updates to report for either the final DSG 2020/21 early years funding, which is now due out in November 2021, or the 2021/22 financial year which won't be known until January 2022 and subsequent final funding allocation for 2021/22 in July 2022. These DSG funding adjustments will therefore be shared through the respective subsequent DSG papers once known.

2022/23 Budget Planning

- 8.4 The LA currently awaits any further detail in relation to the Early years funding rates from 2022/23. The DfE have confirmed these will be released in the Autumn term 2021 and this will then subsequently inform any proposed funding decision for 2022/23. It is hoped this can be shared for EB recommendation in the December 2021 EB DSG paper, but if the announcement falls too late in the Autumn term the decision will need to be deferred until the January 2022 EB DSG paper.

9 High Needs Block

2021/22 Budget Update

- 9.1 The High Needs Block DSG budget has now been adjusted following the DfE's annual 'import and export adjustment*' announced in July 2021, and it is has confirmed this has decreased our High Needs Blocks funds by a (£102,000) to now £25.456M as there has been a net reduction of 17 pupils from other local authorities home based pupils from 2020/21.
- 9.2 In July 2021, the DfE also announced a further recoupmnt funding adjustment deducting 5 places (of the 50) for 5 Southend pupils placed at the YMCA free school. Equivalent £50,000 (£10,000 per annum per place fund).
- 9.3 The above funding adjustments, alongside the wider demand led nature of high needs funding continues to demonstrate why High needs funding needs considerate and planned monitoring.
- 9.4 Therefore, as to not effect, any already pre-planned service funding allocations as set at the June 2021 Education Board for 2021/22. The total combined £152,000 funding adjustments (referenced in 9.1 and 9.2), which should now be assumed to continue on a permanent basis as this time, will be applied as displayed in Appendix 1 against the "balance held aside from service provision to support any in year high need funding pressures". Reducing that balance from £329,000 to £177,000, and therefore this sensibly will have no impact on currently agreed budgeted service allocations.

'import and export adjustment*' - relates to a DfE defined in year High Need funding adjustment compiled from the latest January school census and RO6 Individualised learner record. Whereby a local authority's high needs block funding allocation is compensated if there is a net import increase from the previous year due to more other local authority home based pupils placed in their area, or alternatively reduced if there is a net export increase from the previous year if more local authority home based pupils are placed in another local authority area. Southend's 2021/22 High Need block allocation has therefore decreased by a further £102k (£6,000 reduction per pupil for 17 pupils), due to a now overall revised net import of 59 pupils, compared to a net import of 76 pupils for the previous year.

2022/23 Budget Planning

- 9.5 The following is the key headlines, released by the DfE in relation to High needs funding for 2022/23 and we must remain minded 2022/23 is now the 3rd and final year of the government's previous 3 year increased funding announcement for schools and high needs block:
- 9.5.1 The funding floor will be set at 8% so each LA can plan for an increase of at least that percentage, after taking into account changes in their 2 to 18 population estimated through the office of national statistics.
- 9.5.2 The gains cap will also be set at 11%, on the basis of their 2 to 18 head of population, allowing authorities to see up to this percentage increase under the funding the formula.
- 9.6 Therefore, for our own local 2022/23 DSG high need funding allocation this has now been indicatively been set at £27.718M, an additional £2.262M from

2021/22, applying a gain increase of 9.14%, so above the funding floor protection of 8%, but slightly below the gains cap of 11%. Southend is therefore receiving the full funding allocation through the Formulae in 2022/23.

- 9.7 This therefore is obviously great news once again (as was 2021/22's funding announcement) for Southend's children and young adults who require special educational needs related support and children who require alternative education.
- 9.8 And again, as per our local DSG annual funding cycle, the actual full detailed application of this additional 2022/23 funding will be considered as part of the EB June 2022/23 High Need detailed allocation budget paper. June was agreed through the EB to allow enough time for the SEND team in consultation with respective special schools and mainstream schools to allocate the expected in borough EHCP banded funding rates for the following academic year 2022/23. Following the completion of EHCP banded levels consultation this can then subsequently support any required wider funding considerations for that Academic Year to come.

10 Central Block

2022/23 Budget Planning

- 10.1 The following is the key July 2021 headlines released by the DfE in relation to central block funding for 2022/23:
- 10.1.1 As stated previously, the department are continuing to reduce the element of funding within central block that some local authorities receive for historic commitments made prior to 2013 to 2014.
 - 10.1.2 In 2022/23 for those local authorities that receive it, historic commitments will be reduced by a further 20% from the 2021/22 baseline.
 - 10.1.3 The funding for ongoing responsibilities (LA statutory duties) to deliver for all pupils in maintained schools and academies, will continue to be protected for any losses below -2.5% from the 2021/22 allocation for any reduction in changes between per pupil numbers (between October censuses), but reversely any gains gapped at 5.6% where pupil numbers increase.
- 10.2 The reduction in funding for historic commitments is no surprise, although ofcourse disappointing and was first shared in both the October 2019 and December 2019 EB DSG papers, including a position statement at that time that our own LA should now continue to plan on further funding losses in 2021/22 and beyond.
- 10.3 In December 2020, EB agreed the plan to manage these continued expected funding losses for both the 2022/23 and 2023/24 financial year by drawing on any remaining Central Block DSG reserves to continue to fund the remaining historic commitment funded services at their current funded levels for these 2 years. There is therefore no need to re-consider this position for 2022/23 but it

will need to be considered for 2025/26 subject to no further increase acceleration of this funding unwinding by the DfE. Further central block funding planning will therefore need to commence in 2023/24 or 2024/25 by the latest. At the same time we also need to await any further funding announcement from the DfE in view of the current consultation on a Hard NFF (as referenced in 3.7).

- 10.4 The table below simply illustrates the now confirmed DSG funding losses for our LA central block historic commitment allocation from the start of 2019/20 through to 2022/23 with a further current suggested trajectory to 2025/26 at the current continued rate of a 20% loss from the previous years base line. This is then also mapped alongside the now current funded commitment for historic services (following the EB December 2020 DSG paper), giving an indicative suggestion of how long those commitments can remain funded at their current levels until a Central block DSG reserve deficit balance would occur in 2025/26. Again, this table is heavily caveated that the DfE may choose to accelerate these losses further so we must continue to await and review further details as they are announced:

	Financial Year	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
A	DSG Funding remaining	£905,000	£724,000	£579,000	£463,000	£371,000	£297,000	£237,000
	% unwound*		20%	20%	20%	20%	20%	20%
	Funding loss*		(£181,000)	(£145,000)	(£116,000)	(£92,000)	(£74,000)	(£60,000)
B	Current spend commitment*			£430,000	£430,000	£430,000	£430,000	£430,000
A - B	Variance Underspend or (Overspend)			£149,000	£33,000	(£59,000)	(£133,000)	(£193,000)
	Central Block forecast reserve balance at 31 st March (Deficit)			£326,000	£359,000	£300,000	£167,000	(£26,000)

* % and funding loss unwound from the previous year. – forecast 2023/24 to 2025/26, can only assume until the DfE make further announcements in relation to the Hard NFF it will continue at the rate of 20% each year from the previous years base line.

* Current spend commitment following December 2020 Education Board

11 Latest forecast DSG reserve balances and Use of Reserve strategy

- 11.1 The table below updates the anticipated forecast DSG reserve balances for the end of 2022/23, caveated this is based on latest forecasts and will be updated at the December 2021 EB and of course the actual end of year position shared in June 2022 EB. All current forecasts and reserve balances have been explicitly shared and explained within previous EB papers, with the exception of the now growth fund which has been updated following confirmed Sept 2021 intake whereby an additional Secondary School intake class was now required.
- 11.2 It must also remain minded, as shared in the EB June High Need budget setting 2021 paper all High Needs top funding rates have been increased from Sept 2021 and now administered on a revised banded model. Therefore any current forecast underspend is as shared in the EB June 2021 paper whereby funded provision has also been put aside to support permanent funding for new service provision to commence.

- 11.3 It therefore continues to be with considerable recognition (giving the DSG reserve deficits of 2017/18 and 2018/19 on high needs) of the work undertaken by the LA, EB, Special Schools and Schools that our DSG balances are now in this healthy financial position.
- 11.4 The reserves table also represents the EB approved principle that each separate block of DSG funding is contained and managed within its own funding allocation, therefore meeting the specific required pure educational funding duties for that block.

Block	Schools – ISB	Schools – growth	Schools – de-delegated	Early Years	High Needs	Central	Total
	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Reserves surplus / (deficit)							
1 April 2021 B'fwd	0	182	14	1,105	3,003	177	4,481
Agreed Issue to 2122 budget	0	0	0	(112)	0	0	(112)
Early years funding adjustment 2020/21 (tbc)				0			0
2021/22 current forecast variance	0	(44)	0	0	2,111	149	2,217
31 March 2022	0	138	14	993	5,114	326	6,586
Recommended Minimum Reserve balance *	0	138	14	500	2,217	326	3,195
One off Funding Available for DSG Conditional Use *	0	0	0	493	2,897	0	3,390

- 11.5 Whilst, the table above does present the current forecast reserve balances at the 31st March 2022, it also now includes two additional rows, one for a “recommend minimum reserve balance”, and therefore, now lastly a row for “One off Funding Available for DSG Conditional Use” which is in effect simply the difference between the current projected reserve balances and the recommended minimum reserve balance.

- 11.6 It must be noted that both current DSG School block “Growth reserves”, and now “Central Block reserves” are specifically linked to required known funding pressures in future years and therefore are not available for any other purpose. The “de-delegated Schools block reserve”, is a small reserve which simply supports the claims for public duties for maintained schools and any academy

school that choose to buy in for the year they are claiming. Therefore the reserve balance held on this block simply helps to determine an appropriate de-delegated amount or buy in level per pupil for the following year which is made in recommendation at the annual December EB meeting.

- 11.7 The proposed principle of Minimum Reserve balances shown on both Early Years and High Needs therefore now highlights funding available for one off use. The principles of these balances are as highlighted in the June 2021 EB DSG Final Outturn paper surfacing the fact that one off funding with conditions of the grant are now available:
- 11.7.1 It was and continues to be made with recommendation that the Early Years block always holds a minimum circa 5% of annual funding in reserves to support any fluctuations in funding in and funds paid out that can occur. If the DfE do change the basis of funding for Early years to a permanent termly head count basis then this position will be reviewed as potentially there be less risk for any differences between funding paid in and funding paid out.
- 11.7.2 The recommended minimum reserve balance for the High Needs block, is again, as based and highlighted in the June 2020 EB DSG Final Outturn paper, so in effect to hold a minimum reserve balance of 8% of funding available (which has now been updated on the proposed indicative High Need Block allocation for 2022/23). 8% (as oppose traditional 5%) is recommended, given the volatility and high risk demand nature of spend within High Needs. By always a holding a minimum DSG reserve balance supports long terms financial stability for Southend high need funded services in applicable settings, as should any overspend on High Needs occur in any one year, it can first be met from a reserve balance as oppose unfortunate and unavoidable funding reductions for applicable settings. Ofcourse, if an overspend did occur, the position would have to be managed on a long term basis as reserve balances can only be spent once, but it does buy considerable time to sensibly co-ordinate a required and balanced response.
- 11.7.3 It is proposed these minimum % reserve balances for both Early Years and High Need are reviewed on an annual basis to assess their appropriateness in size at the time considering any potential further future funding constraints or growth.
- 11.8 In view of the required Governance structure and actual use of available reserve balances, its for the LA lead officers of those service areas under the instruction of the LA Director for Education, so for the LA Head of Early Years for Early Years, LA Head of SEND and LA Head of Access and Inclusion for High Needs to determine the right targeted approach for the one off use of those available reserve balances within the conditions of the DSG grant, but also with approval through the Education Board (EB). Therefore in order to ensure the use of one off reserves can be used at pace where required but whilst also meeting the need of appropriate governance arrangements, it is proposed the following approaches are adopted at this time, again these will be subject to annual review determining their effectiveness and impact on reserve balances:

- 11.8.1 That any one off cumulative use of reserve balances below £50,000 in any one financial year has the required LA lead officer approval (as referenced in 11.8) to proceed, but on the conditional basis this is reported through to EB.
- 11.8.2 That any single expenditure item or where the cumulative use of reserve balance was to fall above £50,000 in any one financial year then EB approval is firstly required. If the item or the matter is urgent, then approval can be given by an urgent virtual EB agreement but with a subsequent note to the actual and following scheduled EB meeting for formal minuting.

12 Conclusion

- 12.1 Overall, it has to be recognised that the 2022/23 funding announcements for both the Schools and High Needs block, are both a positive and welcome message for Dedicated School Grants funds and therefore the educational services provision those funds support.
- 12.2 It does however remain noted, it is disappointing that the DfE intention for Dedicated School Grant funding allocations to support “historic commitments” under the Central Block in 2022/23 has continued to unwind further, despite our now local strategy to mitigate these losses up until 2025/26.
- 12.3 It is again with praise for of the collaborative approach of working through the LA, EB, Special Schools, Schools and Early Years providers that our local DSG balances are thankfully now in this healthy financial position. We must continue to plan on a sustainable funding basis given 2022/23 is the last year of the previous DfE funding announcements for Schools and High Needs. It is therefore highly unlikely, given the global pandemic and required national economic recovery response, that the DfE funding increases that have been awarded to the DSG for all LA’s and Schools (and in particular the High Needs block) over the last 3 years from 2022/23 will ever be increased by these levels again in the next 10 years.

13 Appendices

- Appendix 1 - DSG Updated budget allocation 2021/22 and Indicative budget allocation for 2022/23
- Appendix 2 - DSG Illustrative Individual Mainstream School Budget per pupil led funding rate 2022/23

Recommend, if printed, to print in A3 Portrait

		A	B	C = A + B	D	E = D - C	F	G = F - C
		£	£	£	£	£	£	£
		2021/22					2022/23	
Block	S251 Line ref. Summary Line	Original Budget	In Year Budget adjustments	Latest Budget	Forecast Outturn	Final Variance Over / (under)	Original Budget	Budget Variation from previous year increase / (decrease)
Schools Block - Individual School Block allocations	1.0.1 Maintained - Primary	24,528,472	-	24,528,472	24,528,472	-		
	1.0.1 Maintained - Secondary	-	-	-	-	-		
	1.0.1 Academy Recoupment - Primary	41,771,611	-	41,771,611	41,771,611	-		
	1.0.1 Academy Recoupment - Secondary	66,600,521	-	66,600,521	66,600,521	-		
	Subtotal Individual School Block allocations	132,900,604	-	132,900,604	132,900,604	-	135,823,895	2,923,291
Schools block - Centrally retained	1.1.8 De-delegated - Staff costs (Public duties)	2,783	-	2,783	2,783	-	2,783	-
	1.4.10 Growth Fund	913,844	-	913,844	957,582	43,738	770,768	(143,076)
Schools Block Total		133,817,231	-	133,817,231	133,860,969	43,738	136,597,446	2,780,215
Early Years	1.0.1 2 year old provision	1,332,587	-	1,332,587	1,332,587	-	1,332,587	-
	1.0.1 3 and 4 y/o provision - Universal	6,999,109	-	6,999,109	6,999,109	-	6,999,109	-
	1.0.1 3 and 4 y/o provision - Additional	2,128,938	-	2,128,938	2,128,938	-	2,128,938	-
	1.0.1 Disability Access Fund	57,195	-	57,195	57,195	-	57,195	-
	1.0.1 Early Years Pupil Premium	98,266	-	98,266	98,266	-	98,266	-
	1.3.1 Central Expenditure (CE) on Children under 5	157,039	-	157,039	157,039	-	157,039	-
	1.3.1 CE EB Agreed one off investment funded from Reserves	112,000	-	112,000	112,000	-		(112,000)
Early Years Block Total		10,885,134	-	10,885,134	10,885,134	-	10,773,134	(112,000)
High Needs	1.0.2 Place Funding - Special Schools	-	-	-	-	-	-	-
	1.0.2 Place Funding - Special Schools Recouped	6,070,000	-	6,070,000	6,036,667	(33,333)	6,070,000	-
	1.0.2 Place Funding - PRU	41,667	-	41,667	41,667	-	41,667	-
	1.0.2 Place Funding - PRU Recouped	808,333	-	808,333	808,333	-	808,333	-
	1.0.2 Place Funding - Special Units	128,000	-	128,000	160,500	32,500	128,000	-
	1.0.2 Place Funding - Special Units Recouped	342,000	-	342,000	294,500	(47,500)	342,000	-
	1.10.2 Place Funding - Free School Recouped	-	50,000	50,000	50,000	-	50,000	-
	1.0.2 Place Funding - CCP and FE Recouped	864,000	-	864,000	846,000	(18,000)	864,000	-
	Subtotal Place funding	8,254,000	50,000	8,304,000	8,237,667	(66,333)	8,304,000	-
	1.2.2 Special School - flexible place funding	40,000	-	40,000	40,000	-	40,000	-
	1.2.1 / 1.2.2 Special School Top ups	5,200,000	-	5,200,000	5,200,000	-	5,200,000	-
	1.2.1 / 1.2.2 Special School - teacher pay and employer pension former grant	388,000	-	388,000	387,669	(331)	388,000	-
	1.2.1 / 1.2.2 Special Units Top ups	380,000	-	380,000	380,000	-	380,000	-
	1.2.2 PRU Top ups	425,000	-	425,000	418,200	(6,800)	425,000	-
	1.2.2 PRU / AP - teacher pay and employer pension former grant	82,500	-	82,500	82,495	(5)	82,500	-
	1.2.2 Preventative Pathway AP top ups	266,000	-	266,000	261,733	(4,267)	266,000	-
	Subtotal Special School and PRU / AP provision top up funding	6,781,500	-	6,781,500	6,770,097	(11,403)	6,781,500	-
	1.2.1 / 1.2.2 EHCP Early years Top ups	130,000	-	130,000	130,000	-	130,000	-
	1.2.1 / 1.2.2 EHCP Inborough Mainstream - Primary Top ups	1,800,000	-	1,800,000	1,800,000	-	1,800,000	-
	1.2.1 / 1.2.2 EHCP Inborough Mainstream - Secondary Top ups	850,000	-	850,000	850,000	-	850,000	-
	1.2.1 / 1.2.2 EHCP Top ups - out of Borough	850,000	-	850,000	850,000	-	850,000	-
	1.2.2 EHCP Top ups - post 16 providers	850,000	-	850,000	850,000	-	850,000	-
	EHCP top up provision schools and post-16	4,480,000	-	4,480,000	4,480,000	-	4,480,000	-
	1.2.3 EHCP funding for independent providers (IP)	1,700,000	-	1,700,000	1,700,000	-	1,700,000	-
	1.2.7 Alternative Provision (non EHCP and LAC Residential Care*) for IP	250,000	-	250,000	250,000	-	250,000	-
	Independent providers	1,950,000	-	1,950,000	1,950,000	-	1,950,000	-
	1.2.4 HN targeted LCHI funding	10,000	-	10,000	10,000	-	10,000	-
	1.2.6 Hospital Education provision	100,000	-	100,000	100,000	-	100,000	-
	1.2.7 Individual Tuition service	250,000	-	250,000	250,000	-	250,000	-
	1.2.5 SEND team - contribution towards Early Years SENCOs and Education Psychology	635,000	-	635,000	635,000	-	635,000	-
	1.2.5 SEN Support Services	211,500	-	211,500	211,500	-	211,500	-
	1.2.8 Inclusion Service	590,000	-	590,000	539,167	(50,833)	590,000	-
	1.2.5 Elective Home Education Costs (EHCP)	20,000	-	20,000	20,000	-	20,000	-
	1.2.5 Elective Home Education Costs (Alternative Provision)	47,000	-	47,000	42,000	(5,000)	47,000	-
	1.2.11 Direct payments	100,000	-	100,000	100,000	-	100,000	-
	Other High Need funding provision including SLA's	1,963,500	-	1,963,500	1,907,667	(55,833)	1,963,500	-
	Total High Need Non-Place funding	15,175,000	-	15,175,000	15,107,764	(67,236)	15,175,000	-
	High Needs block service lines total	23,429,000	50,000	23,479,000	23,345,430	(133,570)	23,479,000	-
	1.02 / 1.2.2 Further enhanced mainstream EHCP place based provision and top up funding	600,000	-	600,000	-	(600,000)	600,000	-
	1.02 / 1.2.2 Further Alternative place based provision and top up funding	600,000	-	600,000	-	(600,000)	600,000	-
	1.2.5 Further service provision for Wider SEND support	600,000	-	600,000	-	(600,000)	600,000	-
	Funding allocations for required future service provision (to be developed during 2021/22)	1,800,000	-	1,800,000	-	(1,800,000)	1,800,000	-
	1.2.3 2022/23 Additional Funding to be allocated at the June 22 Education Board						2,261,820	
	1.2.3 Balance held aside from service provision to support any in year high need funding pressures	329,437	(152,000)	177,437	-	(177,437)	177,437	-
High Needs Block total*		25,558,437	(102,000)	25,456,437	23,345,430	(2,111,007)	27,718,257	2,261,820
Central block	1.4.1 Contribution to combined budgets	579,129	-	579,129	429,888	(149,241)	463,303	(115,826)
	1.4.14 Copyright Licenses	137,486	-	137,486	137,486	-	137,486	-
	1.4.2 School Admissions	275,617	-	275,617	275,617	-	275,617	-
	1.4.3 Servicing of School Forums	18,700	-	18,700	18,700	-	18,700	-
	X.X Protected Centrally Employed teacher employer pension contribution	95,332	-	95,332	95,332	-	95,332	-
	1.5.1/1.5.2/1.5.3 Retained duties*	449,910	-	449,910	449,910	-	444,790	(5,120)
Central Block total		1,556,174	-	1,556,174	1,406,933	(149,241)	1,435,228	(120,946)
Grand Total		171,816,976	(102,000)	171,714,976	169,498,466	(2,216,510)	176,524,065	4,809,089
DSG - Funding Income								
	Schools Block - ISB Retained	(24,674,330)	-	(24,674,330)	(24,674,330)	-	-	-
	Schools Block - ISB Academy Recoupment	(108,372,133)	-	(108,372,133)	(108,372,133)	-	-	-
	Schools Block - ISB subtotal	(133,046,463)	-	(133,046,463)	(133,046,463)	-	(135,826,678)	(2,780,215)
	Growth fund	(770,768)	-	(770,768)	(770,768)	-	(770,768)	-
	Schools Block subtotal	(133,817,231)	-	(133,817,231)	(133,817,231)	-	(136,597,446)	(2,780,215)
	Central Block	(1,556,174)	-	(1,556,174)	(1,556,174)	-	(1,435,228)	120,946
	Early Years Block (2 year olds)	(1,342,532)	-	(1,342,532)	(1,342,532)	-	(1,342,532)	-
	Early Years Block (3&4 yr olds - Universal)	(7,111,896)	-	(7,111,896)	(7,111,896)	-	(7,111,896)	-
	Early Years Block (3&4 yr olds - Additional)	(2,163,246)	-	(2,163,246)	(2,163,246)	-	(2,163,246)	-
	Early Years Disability Access Fund	(57,195)	-	(57,195)	(57,195)	-	(57,195)	-
	Early Years Pupil Premium	(98,265)	-	(98,265)	(98,265)	-	(98,265)	-
	Early Years DSG final funding adjustment 20/21 (tbc)	-	-	-	-	-	-	-
	Early years subtotal	(10,773,134)	-	(10,773,134)	(10,773,134)	-	(10,773,134)	-
	High Needs Funding Block	(17,800,437)	358,667	(17,441,770)	(17,441,770)	-	-	-
	High Needs Recoupment	(7,758,000)	(256,667)	(8,014,667)	(8,014,667)	-	-	-
	High Needs total	(25,558,437)	102,000	(25,456,437)	(25,456,437)	-	(27,718,257)	(2,261,820)
DSG Funding Total		(171,704,976)	102,000	(171,602,976)	(171,602,976)	-	(176,524,065)	(4,921,089)
DSG Reserves Funding - EB Agreed (Planned Issue from - Early Years)*		(112,000)	-	(112,000)	-	112,000	-	112,000
Total Net DSG Budget		-	-	-	(2,104,510)	(2,104,510)	-	-
DSG Reserves in totality	DSG B/FWD Surplus / (Deficit)	4,481,229	-	4,481,229	4,481,229	-	6,585,739	-
	Previously agreed (Issued to Above) / Drawn from above	(112,000)	-	(112,000)	2,104,510	-	-	-
	DSG C/Fwd Surplus / (Deficit)	4,369,229	-	4,369,229	6,585,739	-	6,585,739	-

Schools						
Schools ISB	Growth	De-delegated	Early years	High Needs	Central	Total
0	182	14	1,105	3,003	177	4,481
0	0	0	(112)	0	0	(112)
0	0	0	0	0	0	0
0	182	14	993	3,003	177	4,369
0	(44)	0	0	2,111	149	2,217
0	0	0	0	0	0	0
0	0	0	0	0	0	0
0	138	14	993	5,114	326	6,586
0	138	14	500	2,217	326	3,195
0	0	0	493	2,897	0	3,390

Forecast Outturn* - As reported at the June 2021 Education Board with exception of the updated Growth fund application from Sept 2021 and the high need DfE funding adjustments announced in July 2021

Retained Duties* - ongoing funding (former ESG) to support LA Statutory duties - Child and Educational Leadership, Planning and Budget planning, monitoring, Education Welfare and Asset Management

DSG Reserves Funding - EB Agreed (Planned Issue from - Early Years)* - £112,000 is half of the 2 year approved 2020/21 and 2021/22 £224,000 Early Years Reserve draw down agreed at the December 2019 Education Board

Alternative Provision (non EHCP and LAC Residential Care*) for IP - educational contribution to children who are looked after by the Authority but who do not have an Educational Health and Care Plan

Recommended Minimum Reserve balance required* - Growth, and Central block reserves are all on pre-conditioned Education Board plans to support those area's in future years. Early Years is recommended to maintain a minimum reserve balance of £0.5M (equivalent circa 5% of annual funding) at all times, and High Needs at 8% or annual funding due to the high risk spend nature of service provision.

Appendix 2 - DSG Illustrative Individual School Budget per pupil led funding rate 2022/23

Recommend, if printed, to print in A3 Landscape

				A	B	B1	B2	B3 = IF(B > ((B1 * B2) + B1), "B", (B1 * B2) + B1)	C	D = ((A * B3) + C) / A
				£	£	£	£	£	£	£
URN*	Primary / Secondary	Maintained / Academy	School Name	21/22 NOR *	22/23 Illustrative Core NFF Pupil led Rate *	21/22 MFG pupil led rate *	22/23 uplift % from the 21/22 per pupil led rate	22/23 Illustrative pupil led rate per pupil	22/23 NFF Lump Sum	22/23 illustrative pupil led rate (including lump sum)
114718	Primary	Maintained	Chalkwell Hall Junior School	476	£3,692.91	£3,924.27	2.17%	£4,009.27	£121,729	£4,265.00
114719	Primary	Maintained	Chalkwell Hall Infant School	362	£3,644.65	£3,843.73	2.21%	£3,928.73	£121,729	£4,265.00
114720	Primary	Maintained	Earls Hall Primary School	631	£3,760.00	£3,987.08	2.13%	£4,072.08	£121,729	£4,265.00
114774	Primary	Maintained	Leigh North Street Primary Schc	602	£3,579.70	£3,977.79	2.14%	£4,062.79	£121,729	£4,265.00
114780	Primary	Maintained	West Leigh Infant School	360	£3,497.54	£3,841.86	2.21%	£3,926.86	£121,729	£4,265.00
114787	Primary	Maintained	Barons Court Primary School an	243	£4,024.97	£3,907.10	3.02%	£4,024.97	£121,729	£4,525.91
114789	Primary	Maintained	Heycroft Primary School	401	£3,638.41	£3,876.44	2.19%	£3,961.44	£121,729	£4,265.00
114841	Primary	Maintained	Fairways Primary School	421	£3,680.11	£3,890.86	2.18%	£3,975.86	£121,729	£4,265.00
115145	Primary	Maintained	St Mary's, Prittlewell, CofE Prim	667	£4,113.25	£4,091.53	2.00%	£4,173.37	£121,729	£4,355.87
134860	Primary	Maintained	Eastwood Primary School & Nui	393	£4,032.10	£4,564.33	2.00%	£4,655.61	£121,729	£4,965.36
134861	Primary	Maintained	Edwards Hall Primary School	391	£3,736.73	£3,868.67	2.20%	£3,953.67	£121,729	£4,265.00
115313	Primary	Maintained	Milton Hall Primary School and	618	£4,419.58	£4,686.85	2.00%	£4,780.59	£121,729	£4,977.56
140672	Primary	Academy	Prince Avenue Academy and Nu	404	£4,329.37	£4,194.68	3.21%	£4,329.37	£121,729	£4,630.68
142683	Primary	Academy	Porters Grange Primary School	342	£4,743.38	£4,754.94	2.00%	£4,850.04	£121,729	£5,205.97
144987	Primary	Academy	Our Lady of Lourdes Catholic Pr	419	£3,562.80	£3,889.48	2.19%	£3,974.48	£121,729	£4,265.00
145010	Primary	Academy	Westborough Academy	428	£4,292.43	£4,172.28	2.88%	£4,292.43	£121,729	£4,576.85
143335	Primary	Academy	Hamstel Junior School	573	£4,269.98	£4,158.79	2.67%	£4,269.98	£121,729	£4,482.42
143340	Primary	Academy	Hamstel Infant School and Nurs	447	£4,215.89	£4,130.14	2.08%	£4,215.89	£121,729	£4,488.22
143333	Primary	Academy	Hinguar Community Primary Scl	210	£3,884.37	£3,931.61	2.00%	£4,010.24	£121,729	£4,589.90
143338	Primary	Academy	Greenways Primary School	984	£4,084.79	£4,057.52	2.06%	£4,141.29	£121,729	£4,265.00
142753	Primary	Academy	West Leigh Junior School	521	£3,542.50	£3,946.35	2.15%	£4,031.35	£121,729	£4,265.00
144877	Primary	Academy	Bournes Green Junior School	264	£3,532.61	£3,718.90	2.29%	£3,803.90	£121,729	£4,265.00
140536	Primary	Academy	Darlinghurst School	557	£4,005.89	£3,961.46	2.15%	£4,046.46	£121,729	£4,265.00
143339	Primary	Academy	Bournes Green Infant School	180	£3,610.68	£3,741.56	2.00%	£3,816.40	£121,729	£4,492.67
144664	Primary	Academy	Temple Sutton Primary School	659	£4,334.90	£4,204.53	3.10%	£4,334.90	£121,729	£4,519.62
143337	Primary	Academy	Blenheim Primary School	611	£3,819.73	£3,980.77	2.14%	£4,065.77	£121,729	£4,265.00
145678	Primary	Academy	Sacred Heart Catholic Primary S	386	£4,264.91	£4,196.48	2.00%	£4,280.41	£121,729	£4,595.77
146015	Primary	Academy	St Helen's Catholic Primary Schc	385	£4,141.84	£4,067.21	2.00%	£4,148.55	£121,729	£4,464.73
146016	Primary	Academy	St George's Catholic Primary Scl	208	£3,977.04	£3,844.51	3.45%	£3,977.04	£121,729	£4,562.28
143966	Primary	Academy	Bournemouth Park Academy	540	£4,471.58	£4,540.75	2.00%	£4,631.56	£121,729	£4,856.99
144878	Primary	Academy	Richmond Avenue Primary and	404	£4,137.40	£4,156.89	2.00%	£4,240.02	£121,729	£4,541.33
143334	Primary	Academy	Friars Primary School and Nurse	414	£4,317.32	£4,299.08	2.00%	£4,385.06	£121,729	£4,679.09
143336	Primary	Academy	Thorpedene Primary School	497	£4,420.23	£4,502.76	2.00%	£4,592.82	£121,729	£4,837.74
141741	Secondary	Academy	Chase High School	924	£6,328.20	£6,262.35	2.00%	£6,387.60	£121,729	£6,519.34
143144	Secondary	Academy	Southchurch High School	757	£6,324.97	£6,918.60	2.00%	£7,056.97	£121,729	£7,217.78
147185	Secondary	Academy	Cecil Jones Academy	642	£6,519.17	£6,488.79	2.00%	£6,618.57	£121,729	£6,808.18
137733	Secondary	Academy	Shoeburyness High School	1,490	£5,883.39	£5,857.02	2.00%	£5,974.16	£121,729	£6,055.86
136272	Secondary	Academy	Westcliff High School for Boys A	906	£4,996.68	£5,280.64	2.08%	£5,390.64	£121,729	£5,525.00
137284	Secondary	Academy	The Eastwood Academy	1,073	£5,540.05	£5,418.77	2.24%	£5,540.05	£121,729	£5,653.50
136490	Secondary	Academy	Westcliff High School for Girls	907	£5,021.74	£5,280.79	2.08%	£5,390.79	£121,729	£5,525.00
136444	Secondary	Academy	Southend High School for Girls	900	£5,038.17	£5,279.75	2.08%	£5,389.75	£121,729	£5,525.00
138174	Secondary	Academy	Belfairs Academy	1,334	£5,417.13	£5,323.75	2.07%	£5,433.75	£121,729	£5,525.00
136443	Secondary	Academy	Southend High School for Boys	897	£4,994.06	£5,279.29	2.08%	£5,389.29	£121,729	£5,525.00
137310	Secondary	Academy	St Thomas More High School	845	£5,533.94	£5,439.70	2.00%	£5,548.49	£121,729	£5,692.55
137312	Secondary	Academy	St Bernard's High School	781	£5,431.22	£5,377.03	2.00%	£5,484.58	£121,729	£5,640.44
				26,454						

* URN = DfE's defined Schools "Unique Reference Number"

* NOR = Numbers on roll. 21/22 is as per the October 2020 school census

* 22/23 Illustrative Core NFF Pupil led Rate - this is purely illustrative as it reflects the 22/23 NFF Core Funding rates applied to the 20/21 individual school characteristics as per the School's October 2020 Census. The Schools characteristics will therefore be updated to October 2021 as part of the final formula

* 21/22 MFG pupil led rate - as defined by the DfE under NFF, has been baselined to the 21/22 individual schools per pupil led rate less the 22/23 change in the NFF lump sum rate from 21/22 per 21/22 NOR pupils

Southend Education Board (EB), Resources Sub Group (RSG)

5th October 2021, 4.15-5.30, (held virtually on-line through MS teams)

DRAFT Minutes of the meeting

7

Membership of the sub group for Resources	(nominations received) representation
<p>3 nominations from the Education Board (Headteacher/governor)</p> <p>4 other members nominated from the four associations</p> <p>1 school business manager nominated from the RSG</p> <p>Council Officer representation as required for the papers</p>	<p>Robin Bevan (secondary) CHAIR Jane Ladner (secondary, governor) Stuart Reynolds (secondary)</p> <p>Vacant (primary) Vicky Wright (early years) Jackie Mullan (special) Anthony McGarel (post 16)</p> <p>Simon Oxenham (SHSB)</p> <p>Paul Grout (Senior Finance Business Partner)</p> <p>cc. Brin Martin (Director of Education) Gary Bloom (Head of SEND) Cathy Braun (Head of Access and Inclusion) Elaine Hammans (Head of Early Years)</p>

Time	Agenda item	Decision? Action
4.15	<p>Membership Apologies</p> <p>And council officer representation as required for papers</p> <p>Officers present:</p> <p>Paul Grout & Cathy Braun (in attendance)</p>	<p>No apologies – full attendance on current membership</p> <p>Noted – Jane has given her apologies in advance for the next 30th November RSG mtg, due to a prior diary School related commitment.</p>
	<p>Membership Vacancies</p>	<p>Nick Booth former Primary representative has confirmed his resignation from the RSG. The RSG thank Nick for his willingness to serve and now have a Primary representative vacancy.</p>

		<p>Action: Robin will first offer the primary vacancy to an EB primary representative member. If no EB members wish to volunteer. RSG will seek directly a Primary representative with a fair process for opportunity to join.</p>
4.20	<p>Minutes of the last meeting 08.06.21</p> <p>Any matters arising not covered elsewhere on the agenda</p>	<p>No amendments. Minutes agreed and now Final.</p> <p>Paul fed back that the RSG has submitted its response in relation to the DfE July 21 consultation for a Hard National Funding Formulae setting individual school budgets.</p> <p>The DfE have also announced at this time, there will now be 2 further consultations that the RSG have agreed to respond on:</p> <ol style="list-style-type: none"> 1) A further consultation on the HARD NFF 2) A further consultation on High Needs funding following the national SEND review.
4.25	<p>DSG 2022/23 budget planning and 2021/22 budget update</p> <p>(DRAFT Paper attached)</p> <p>Officer Lead: Paul Grout</p>	<p>Key discussion items:</p> <p>On Appendix 2 - Why are some individual schools above a straight 3% uplift per pupil on their 22/23 allocation? Paul confirmed it is a circa 3% increase where applicable through those core NFF factors. Simon also confirmed this was feeding through correctly on the formula, and linked to certain deprivation indices.</p> <p>With the current commitment spend on Central block commitments why is this flat with no inflationary increases? Paul confirmed these are contributions to joint funded council initiatives and therefore any inflation applied will also just unwind their remaining affordably faster. They are also contributions from an historic DfE DSG fixed grant funding source now unwinding, so inflation was also never affordable on that grant source.</p>

		<p>When are we expecting to hear any DfE funding announcements for updated 2021/22 Early Years allocations? Paul confirmed as referenced in the paper this is expected by the DfE in November 2021.</p> <p>For 2022/23 as High Needs also has additional funding when will this be considered for applicable schools. Paul confirmed as referenced in the paper, the funding is applicable for the 2022/23 financial year, and will be as per annual agreement considered in the June 2022 EB high need paper for the start of the 2022/23 academic year.</p> <p>Paper amendments agreed:</p> <p>Within Recommendation 2.1.1 – make clear this is in relation to mainstream schools only.</p> <p>With 3.4 – make reference that the DfE are, as part of the recent Hard NFF consultation, looking to also move maintained schools to funding and accounting on an academic year as opposed to the current financial year system.</p> <p>Within 11.7 – make reference that the proposed minimum reserve balance %'s for Early Years and High Needs are subject to annual review in light of observed volatility and accrued levels of balance.</p> <p>Within recommendations 2.2.2 and section 11.8:</p> <ul style="list-style-type: none"> • That any cumulative use of reserve balances below £50,000 (in any one financial year), has LA officer approval to proceed on the basis this is reported back through to EB. • On any single item that is above £50,000 or where any cumulative use of reserve
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		<p>balances fall above £50,000 then EB approval is firstly required. If the item is urgent, it is recommended this can be given by an urgent virtual EB agreement but with a subsequent note to EB for formal minuting.</p>
5.30	<p>AOB</p> <p>FYI only:</p> <p>Date of next meetings and current forward plan</p> <p>Future RSG meeting dates – MS Teams or Southend High School for boys 4:15 pm to 5.30/6.00 pm current planned papers ahead of Education Board (EB):</p> <p>December 2021 (30th November ahead of EB date tbc)</p> <ul style="list-style-type: none"> • DSG 2022/23 Final Budget planning and Forecast Outturn 2021/22 <p>June 2022 (Date tbc ahead of EB date tbc)</p> <ul style="list-style-type: none"> • DSG Final Outturn 2021/22 • DSG High Need detailed budget allocations 2022/23 <p>Meeting close</p>	

Southend Education Board
School Performance Sub Group (SPSG) Agenda
12th July 2021 at 2pm

Membership

Position	Name	Email
Primary Rep	Darren Woollard (Chair)*	darren.woollard@lihtrust.uk
Primary Rep	Jim Johnson*	headteacher@edwardshall.southend.sch.uk
Secondary Rep	David Struthers*	d.struthers@setsa.info
Special Rep	VACANCY	
Governor Rep	VACANCY	
Education Board Nominee	VACANCY	
Education Board Nominee	Lisa Clark*	headteacher@hamstel-inf.southend.sch.uk
Education Board Nominee	VACANCY	
Early Years	Vicky Wright*	vickywright@southend.gov.uk
Post 16	VACANCY	
Director of Learning	Brin Martin*	brinmartin@southend.gov.uk
Head of school performance and provision services	Amanda Champ*	amandachamp@southend.gov.uk
RSC	Sue Baldwin (or representative)	rsc.eastnelondon@education.gov.uk

*denotes attendance

Terms of Reference

- To advise Council/Cabinet and subsequently own a School Performance Strategy for Southend.
- To implement the School Performance Strategy in order to improve performance in all schools.
- To work with schools to periodically collect and analyse performance data (subject to data sharing protocol and agreement on high level data dashboard KPIs).
- To advise Council/Cabinet on the appropriateness of future priorities, targets and measures used to determine progress.
- To advise, monitor and challenge the commissioned support for schools, including core programmes and specific targeted interventions in order to ensure impact and value for money.
- To ensure that Education Board has the appropriate information about the effectiveness of commissioned support in order to make informed decisions about future expenditure.
- To keep the Regional School Commissioner updated about developments in Southend.

Agenda for the meeting

Agenda Item	Lead	Notes
Welcome and apologies	DW	<p>All were welcomed to the meeting. It was noted that new members will be required in the next academic year.</p> <p>Action: Education Board to nominate new members to represent the board at SPSG.</p>
Review of information provided by schools	BM	<p>A survey was sent to all primary schools, but the responses were limited. All maintained schools were required to complete a response. The responses received show that there is no particular pattern around gaps in learning for specific year groups or subject areas, but there are some common themes which focus on pupils' health, wellbeing and resilience.</p> <p>There was recognition that where areas of learning have been identified by schools, such as reading and maths which were higher priorities, schools are best placed to address these, although there may be opportunities for more collaborative working between schools and trusts. Some schools in Southend have engaged with the National Tutoring Programme, but we do not have information about the impact of this; there is a general feeling that the funding being offered to schools is insufficient to meet the needs.</p> <p>Some further work around how the LA could support a response to the wider aspects of recovery would be welcomed, but this needs to have very clear goals and success criteria in order to ensure that the available funding targets the right things and does not become a wasted opportunity.</p> <p>Action: Brin/Amanda to prepare a paper for Education Board.</p>

		SOPHA will meet on 22 September and will seek reps to form a steering group so that any response within the LA is co-constructed.
Review SPSG annual plan, including date of next meeting	DW	It was agreed that next year there will be a termly meeting, with additional extraordinary meetings as required.
AOB	All	

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