

LANCASHIRE SCHOOLS FORUM

Meeting to be held at 10.00 am on Tuesday 5 July 2022 in the Savoy Suite, the Exchange, County Hall, Preston

And via Microsoft Teams

Join on your computer or mobile app

[Click here to join the meeting](#)

Or call in (audio only)

[+44 1772 952601,636428324#](#) United Kingdom, Preston

Phone Conference ID: 636 428 324#

A G E N D A

1. Attendance and Apologies for Absence

To be recorded in accordance with the agreed membership of the Forum.

2. Substitute Members

To welcome any substitute Members.

3. Forum Membership and Election of Chair for 2022/23 (Enclosure)

To note the Forum membership report and elect a Chair for the Schools Forum for the 2022/23 academic year.

4. Minutes of the Last Meeting (Enclosure)

To agree the minutes of the last meeting held on 17 March 2022.

5. Matters Arising

To consider any matters arising from the minutes of the meeting held on 17 March 2022 that are not covered elsewhere on the agenda.

6. Lancashire County Council's Education Strategy 2022-2025 and Team Around the School and Settings (TASS) (Enclosure)

Julie Bell, Director of Education, Culture and Skills will attend the meeting to present an update on this item.

To consider the update on the Education Strategy 2022-2025 and Team Around the School and Settings (TASS)

7. Recommendations from the Schools Block Working Group (Enclosure)

To consider the recommendations from the Schools Block Working Group from 21 June 2022, including information on school balances at 31 March 2022.

- 8. Recommendations from the High Needs Block Working Group (Enclosure)**
To consider the recommendations from the High Needs Block Working Group from 14 June 2022.
- 9. Recommendations from the Early Years Block Working Group (Enclosure)**
To consider the recommendations from the Early Years Block Working Group from 16 June 2022.
- 10. Apprenticeship Levy Steering Group (Enclosure)**
To consider the recommendations from the Apprenticeship Levy Steering Group from 16 June 2022.
- 11. Recommendations from the Chairs' Working Group**
A verbal update will be provided at the meeting. To consider the recommendations from the Chairs' Working Group from 5 July 2022.
- 12. Support for Ukrainian Families (Enclosure)**
To note the update about Support for Ukrainian Families in Lancashire.
- 13. Urgent Business**
No decisions have been taken using the Urgent Business Procedure since the last meeting.
- 14. Forum Correspondence**
There is no Forum related correspondence to consider at this meeting.
- 15. Any Other Business**
- 16. Date of Future Meetings (Enclosure)**
To note that the next scheduled Forum meeting will be held at 10.00 am on Tuesday 18 October 2022. Arrangements for the meeting will be confirmed in due course.

A copy of the forum schedule of meetings for the 2022/23 academic year is provided. The meetings include a physical venue but may be conducted virtually.

LANCASHIRE SCHOOLS FORUM
Date of meeting 5 July 2022

Item No 3

Title: Forum Membership

Appendix A refers

Executive Summary

This report summarises the changes to the Forum membership since the last meeting and includes information about the appointment of a new Schools Forum Chair

Forum Decision Required

The Forum is asked to:

- a) Note the report;**
- b) Thank Cathryn Antwis, Paul Bonser, Steve Campbell, Jane Eccleston, Gaynor Gorman, James Johnstone, Shaun Jukes, Delyth Mathieson, Alan Porteous, Nicola Regan, Karen Stracey, Sam Ud-din and Laurence Upton for their contribution to the Forum;**
- c) Welcome Abigale Bowe and to her first Forum meeting as the formal PRU representative;**
- d) Welcome Sylwia Krajewska to her first Forum meeting;**
- e) Appoint a new Forum Chair for the 2022/23 academic year from any nominations received.**

- f) Individual members not already on the Education Digital Services Schools Focus Group are asked to consider volunteering.***

Background

This report provides information on Forum membership issues that have arisen since the last Forum meeting. Details are provided below.

Schools Forum Annual Membership Review for September 2022

Previous reports to the Forum in the current academic year have kept members updated on the annual membership review process ahead of the new academic year in September 2022.

Earlier reports noted that no immediate change to the balance in the maintained primary schools, maintained secondary schools and academy membership was required for 2022/23 following the latest analysis of pupil numbers.

The review had also sought responses from schools representatives about whether members wished to continue on the Forum from September 2022. A number of members have indicated that they will not be continuing on the Forum in 2022/23, and this meeting will be their last.

Members leaving the Forum as part of this annual membership review include:

Cathryn Antwis	Primary School Headteacher
Steve Campbell	Secondary School Headteacher
Nicola Regan	Secondary School Headteacher
Gaynor Gorman	Academy Headteacher
Alan Porteous	Academy Headteacher
Shaun Jukes	Special School Headteacher
Jane Eccleston	PRU Headteacher
James Johnstone	Primary School Governor
Karen Stracey	Primary School Governor
Laurence Upton	Primary School Governor
Sam Ud-din	LASGB Observer

The LA is making arrangements to seek replacement representatives for September 2022 and members are asked to note that Steve Campbell and Sam Ud-din may return to the Forum in the new academic year representing different groups.

In the case of the PRU Headteacher representative, the change has been implemented in the summer term 2022 and Abigale Bowe, Headteacher at Shaftesbury High School, has joined the Forum. Members will be aware that Abigale has previously attended the Forum as a substitute member.

A number of these colleagues who are leaving are active and longstanding members, and the Forum will want to express thanks for their contributions and wish them well for the future.

Members will also wish to welcome Abigale to the Forum, as the formal PRU representative.

Head of Service Education Improvement

Members may have seen that Delyth Mathieson, Head of Service Education Improvement is leaving the authority until mid-August, to join Stoke on Trent City Council as Assistant Director for Education and Family Support. The county council is in the process of recruiting a new head of education improvement.

The Forum will wish to thank Delyth for her contribution.

Clerk to the Schools Forum

Paul Bonser is retiring from the county council at the end of the academic year. Sylwia Krajewska has been appointed as his replacement and will take over the role of Forum Clerk.

Whilst Sylwia does not official take up her post until after the Forum meeting, she hopes to be in attendance as an observer at the 5 July meeting.

The Forum will wish to thank Paul for his contribution to the Forum and to welcome Sylwia to the Forum.

Schools Forum Chair

As mentioned above, Shaun Jukes has indicated that he will not continue on the Schools Forum from September 2022.

The Forum will therefore need to elect a new chair for the 2022/23 academic year.

Whilst recent appointments for the roles of Forum Chair and Vice-Chair have been for a 2 year period, it is recommended that the election of the Chair from September 2022 should initially be for the 2022/23 academic year only. This is because the existing appointment for Shaun as Chair, and Stephen Booth as Vice Chair, were made in September 2021, covering the 2021/22 and 2022/23 academic years. A single year appointment for the new Forum Chair for 2022/23 would mean the existing 2 year appointment cycle could be resumed from September 2023.

Attached at **Appendix A** is information on the Role of the Schools Forum Chair.

Any members who wish to nominate themselves to stand as Forum Chair are asked to inform the Forum clerk by emailing schoolsforum@lancashire.gov.uk ahead of the meeting, if possible.

If more than one nomination is received, it will be necessary to conduct a vote at the Forum meeting to formally elect the Chair for 2022/23.

Schools Forum Representatives on the Education Digital Services Schools Focus Group

Education Digital Services provide a wide range of services to Lancashire schools and their Schools Focus Group is an important vehicle for engaging with the service. In addition, the group meets jointly with schools payroll and recruitment services.

The Schools Forum is one of the organisations that nominates members to sit on the Focus Group, but due to Forum membership changes, a number of vacancies now exist on the group or will become vacant in the near future, and an email was circulated in May 2022 seeking volunteers to join the group on behalf of the Forum. The email provided the latest TOR and the current list of representatives and included an offer to discuss the work of the group with the Head of Education Business Development at Education Digital Services if members wanted further information.

Identified vacancies included:

- Primary School Headteacher
- Secondary School Headteacher
- School Governor
- Academy Representative (new)

By the closing date of 31 May 2022, the following members had volunteered

- Anna Smith, Headteacher, Burscough Village Primary School,
- Jackie Lord, governor at Penwortham Girls High School

During this process Laurance Upton also confirmed that he is leaving the Forum and therefore resigning from the focus group.

Any members not already on the Education Digital Services Schools Focus Group are asked to consider volunteering.

Role of the Schools Forum Chair

Eligibility

The Schools Forum must elect a Chair from amongst its own voting members, but this cannot be an elected member or officer of the local authority.

Duties/Tasks

The role of Chair of the Lancashire Schools Forum includes a number of duties and responsibilities, which are listed below. Whilst the list is wide-ranging, many of these are only required on an infrequent basis.

Duties include:

- Chairing meetings of the Lancashire Schools Forum
- Chairing the Schools Forum's Chairs' Working Group, including:
 - Recommending additional representatives from other groups be invited to particular meetings of the Chairs' group if this was relevant to issues being discussed at that meeting;
 - In conjunction with other representatives of the Group offering a steer to the County Council around any issues affecting schools or the Schools Budget that may be confidential in nature;
 - In conjunction with other representatives of the Group offering a sounding board for the County Council in the development phase of Schools Budget proposals;
 - Receiving briefings in advance of meetings to ensure the smoothing running of the Forum meetings.
- Liaison with the Press on Schools Forum related issues, including:
 - Issuing press releases on key Forum issues, via the County Council's Media Team;
 - Commenting to the press on relevant School Budget related issues on behalf of the Forum.
- Being the public face of the Forum
- Contributing to the annual Schools Forum induction session for new members.
- Representing the Schools Forum on school user groups for ICT and HR/Payroll.
- Contributing to the Schools Forum's relationship with constituent groups, including attendance at relevant meetings, for example the Lancashire Academy Principals Group, Lancashire Academy Governors meeting or the Primary Heads in Lancashire (PHiL) Executive.
- Presenting a Schools Forum perspective, a County events, such as District Chairs of Governors meetings and County Council school funding consultation seminars.

- Communicating directly with Lancashire schools and academies on key issues where the Schools Forum has been involved.
- Receiving information from DfE on School Funding matters.
- Responding to DfE consultations on school funding related matters on behalf of the Schools Forum.
- Corresponding with the Prime Minister, Secretary of State for Education, Lancashire MPs and other DfE and ESFA officials on behalf of Lancashire schools and the Forum.
- Attending and contributing to relevant Schools Forum related events and surveys at a national and regional level.
- Receiving and responding to written and verbal communication with Lancashire schools on relevant school funding issues.
- Making representations on key issues on behalf of schools and the Forum to the County Council and its partner organisations, including meetings with:
 - the Leader of the County Council;
 - Chief Executive of the County Council;
 - the Cabinet Member for Education and Skills
 - the Executive Director of Education and Children's Services and the Director of Education and Skills;
 - other LCC Directors.
- Attending meetings with senior County Council members and officials to provide a school perspective and insight on County Council initiatives, for example the living wage.

LANCASHIRE SCHOOLS FORUM

**MINUTES OF THE MEETING HELD AT 10:00 A.M. ON THURSDAY 17 MARCH 2022
(Virtual meeting via Microsoft Teams)**

Present:

Schools Members:

Primary School Governors

Stephen Booth
Gerard Collins
Laurence Upton
Karen Stracey
Tim Young

Primary School Headteachers

Angela Aspinwall-Livesey
Daniel Ballard
Jenny Birkin
Neil Gurman
Deanne Marsh
Michelle O'Neill
Anna Smith
Keith Wright
Mike Wright

Secondary School Governors

Janice Astley
John Davey
Gill Donohoe
Brian Rollo

Secondary School Headteachers

Steve Campbell
Mike Wright

Nursery School Headteacher

Jan Holmes

Nursery School Governor

Thelma Cullen

Early Years - PVI

Peter Hindle
Sharon Fenton
Philippa Perks

Academy Governor

Chris McConnachie
Helen Dicker
Louise Shaw

Academy Principal/Headteacher

James Keulemans
Alan Porteous
John Tarbox

Alternative Provision Academy

Holly Clarke

Special School Academy

Louise Parrish

Special School Governor

Mandy Howarth

Special School Headteacher

Shaun Jukes – Forum Chair
Claire Thompson

Short Stay Governor

Liz Laverty

Short Stay Headteacher

Members:

Other Voting Members

Bill Mann

Observers

Christopher Anderson (NEU)
CC Michael Goulthorp
Sam Ud-din (LASGB)
Nicola Whyte

In attendance: Paul Bonser
Matt Dexter
Millie Dixon
Emma Nicholson
Sally Richardson
Kevin Smith
Howard Walsh

1. APOLOGIES FOR ABSENCE

Apologies were received from Sarah Barton, Julie Bell, Kathleen Cooper, Matt Eastham, Rosie Fearn, Gaynor Gorman, Neil Gurman, CC Jane Rear, Sarah Robson and Robert Waring.

2. SUBSTITUTE MEMBERS

Substitute members were welcomed to the meeting:

- CC Michael Goulthorp attended for CC Jane Rear

2. FORUM MEMBERSHIP

Since the last meeting, two primary school governors have resigned from the Forum.

- Karen Stephens
- Chris Bagguley.

Also, on 8 March 2022, the LA emailed school and early years members of the Forum, as part of the annual membership review, to ascertain if individuals wish to continue to serve on the Forum in the next academic year commencing in September 2022. Responses were requested by Friday 1st April 2022.

The Forum:

- a) Note the report;**
- b) Thanked Karen Stephens and Chris Bagguley for their contributions to the Forum.**

Individual members are asked to complete the annual membership eform by the deadline if they have not already done so.

3. MINUTES OF THE LAST MEETING

The minutes of the last meeting held on 13 January 2022 were agreed as a correct record.

4. MATTERS ARISING

- *Team Around the School and Setting (TASS)*

It was noted that TASS colleagues had been unable to attend this meeting of the Forum, as they had commitments elsewhere in the county at the same time.

Members asked that a TASS representative be invited to the next meeting of the Forum and also requested that feedback be provided to the service that the TASS website information was not up to date.

- *School Teaching and Support Staff Supply Reimbursement Scheme*

Following discussions at the Schools Forum, individual supply scheme offers were issued on the portal on 21 January 2022 and final confirmation letters were issued on 8 March 2022 confirming the cover, if any, that schools have chosen from 1 April 2022.

- *School Feedback on Covid Catch Up*

Feedback from the working groups about covid catch-up funding was included in the report presented to the LCC Education and Children's Services Scrutiny Committee on 22 February 2022. The Committee will continue to monitor the impact of grants on outcomes for young people in Lancashire.

- *Indexation of teachers pensions*

Following on from the issue raised at the last meeting about the impact of the pay freeze this year on the indexation of teachers pensions, and options around providing a £1 pay rise to trigger the indexation, it was noted that the LCC HR advice reported to schools was not to undertake these mechanisms due to the risks involved. At the Forum, some individual schools representatives indicated that their governing bodies had decided to proceed with the mechanism of increasing staff pay by the £1, based on advice from teacher unions.

The Forum did not express a view but indicated that this was a matter for individual school governing bodies to consider for their own circumstances.

The Forum:

- a) **Noted the matters arising.**

6. RECOMMENDATIONS FROM THE SCHOOLS BLOCK WORKING GROUP

A report was presented setting out the recommendations from the Schools Block Working Group held on 3 March 2022.

i. Schools Block Budget 2022/23

At the Schools Forum on 13 January 2022, decisions and recommendations about the 2022/23 Schools Budget were agreed, and on 20 January 2022, the County Council's Cabinet formally approved the Schools Budget for 2021/22.

The Authority Proforma Tool (APT), setting out the agreed Schools Block proposals for 2022/23, was then submitted to the ESFA for compliance checking ahead of the 21 January 2022 deadline.

The ESFA subsequently contacted the LA seeking a small number of clarifications and explanations and once satisfied with the responses provided approval, which was received on 15 February 2022.

In addition, the DfE approved the disapplication submission relating to the MFG protection for the secondary school associated with the loss of the 2021/22 PFI allocation.

School Budgets were prepared and issued on 21 February 2022, together with forecast High Needs Block allocations.

For 2022/23, the DfE are calculating the PPG allocations on the basis of October school census data, rather than the January school census. This means that actual PPG information will be available much sooner. The LA did not therefore include an indicative PPG statement with the budget notifications.

It is anticipated that DfE will publish PPG allocations shortly

Schools Supplementary Grant 2022/23

As reported to the last meeting of the Schools Forum, the Chancellor announced an additional £1.6bn funding for schools and high needs, for the 2022/23 financial year, above the previous Dedicated Schools Grant settlement. For mainstream schools, this funding will be allocated through a schools supplementary grant 2022/23.

DfE announcements indicate that school-level allocations of the schools supplementary grant for 2022/23 will be published in spring 2022, On 28 February 2022, DfE published a Schools Supplementary Grant calculator tool, which enable mainstream schools to estimate the grant allocation they are likely to receive in 2022/23. The calculator is available [here](#)

DSG Funding Adjustment 2023/24

The County Council has also made further representations to the DfE requesting that the DSG allocations for Lancashire for 2023/24 are adjusted to reflect the permanent change of use of the former Hameldon PFI site, which is now being utilised by a special school. We have therefore requested a £1.9m transfer from Schools Block to High Needs Block, so that the contractual school PFI contribution can be met from the correct funding block. Following further dialogue with DfE colleagues, the LA is now preparing a formal submission to the ESFA/DfE requesting the permanent transfer of the £1.9m transfer from Schools Block to High Needs Block in response to the change of the use of the former Hameldon site to a special school and the requirement for future PFI contributions to be made from the High Needs Block.

The Working Group:

- a) *Noted the report.*
- b) *Supported the submission to DfE for a permanent transfer from Schools Block to High Needs Block of £1.9m from 2023/24*

The Forum unanimously supported the submission to DfE for a permanent transfer from Schools Block to High Needs Block of £1.9m from 2023/24.

ii. Request for Clawback Exemption for a Lancashire Primary School in 2022/23

In July 2021, the Forum considered the School Balances and Clawback Policy for 2021/22.

It was agreed that the clawback of excess balances would be suspended in 2021/22 and no clawback would be applied to school balances at 31 March 2022. This clawback

suspension was in recognition of the continued funding and expenditure uncertainties caused by COVID-19.

Furthermore, the Forum indicated that it was likely that clawback would be reintroduced on school balances above the guideline at 31 March 2023 but agreed that this policy would be reviewed in July 2022, in light of the 2021/22 outturn data, any ongoing COVID-19 issues or any other implications, before it was confirmed.

At this point, the financial planning assumptions for Lancashire maintained schools will include the reintroduction of clawback in FY 2022/23. This has raised a particular issue for one Lancashire primary school and the views of the working group were sought on a request to exempt the school from clawback at 31 March 2023, if Forum ultimately agree to confirm clawback reintroduction.

The school in question is based on an army barracks in the county. This presents some peculiar challenges for the school, especially as and when the army changes the troops posted at the barracks, as this can mean that a significant proportion of the school's pupils leave en masse and then later a similar number of pupils are enrolled as a new regiment moves in.

Information about the planned troop movements at the barracks and the financial implications were shared with the working group.

The Working Group:

- a) *Noted the report;*
- b) *Recommended that the Forum agree to exempt the Lancashire primary school from clawback at 31 March 2023 due to the circumstances set out in the report.*

The Forum ratified the working group's recommendations.

iii. Inclusion Hub Funding 2022/23

Following a consultation with schools in the autumn term 2021, the Forum again voted to de-delegate funding for primary inclusion hubs in 2022/23. The de-delegation cost was held at the 2021/22 rate of £11.00 per pupil for maintained primary schools and generates circa £1m for inclusion hub activities in Lancashire.

Following an initial year of Inclusion Hub funding allocated on a 'pump priming' basis of £80k per district in 2019/20, the distribution methodology has used pupil numbers and a deprivation factor to calculate the allocations for each district. For 2022/23, it was proposed to continue this methodology and the information on the allocations calculated for each district from April 2022 was provided.

Further updates will be presented to the Forum in due course about the operation of the hubs, and the Forum will need to make formal decisions in October 2022 about de-delegation options for 2023/24.

The Working Group:

- a) *Noted the report;*
- b) *Supported the continued use of the NOR plus deprivation methodology for distributing de-delegated funding to inclusion hubs in 2022/23.*

The Forum ratified the working group's recommendations.

iv. School Business Rates

Schools Block School Business Rates Arrangements 2022/23

Information has been provided previously for members about revised arrangements for school business rates from April 2022.

There are still a number of details about how the new rates system will work yet to be finalised by the government. However, a key issue has recently arisen where it appears that the government will not enforce the new system on billing authorities in 2022/23, leaving the decision with each relevant authority about whether to opt into the system or opt out.

In Lancashire, the district councils are the billing authorities and we do not yet have any confirmation about the intentions of these councils.

Recent feedback from the Estates Team indicates that initial responses from some Lancashire billing authorities is that they will not be opting in to the DfE's revised billing arrangements from April 2022, meaning that the rates system is likely to remain as it operated in 2021/22 for many schools. This would involve schools and academies paying the relevant business rates bills from their local billing authority. This is because the latest information suggests that all the billing authorities in our county would need to opt into the revised billing system for the new arrangements to go live, but we are awaiting final confirmation of this.

Bid to the Rate Reimbursement Policy

The Schools Forum has agreed a rate reimbursement policy. The future of the policy will need to be clarified in light of the final school business rate arrangements applicable in Lancashire from April 2022, but the existing policy will remain active until 31 March 2022, at least.

The rates reimbursement policy requires schools to submit a business case in year to the authority, where the actual in year costs incurred by a school is greater than budgeted and the difference is greater 1% of the Total Schools Block Budget Share for the same funding period or £5,000.

To date, this policy has only reimbursed school block funded schools, as this is the only local funding formulae with a rates factor included. However, the LA has recently received a request to consider a reimbursement to a maintained nursery school.

The school has recently received an additional rates bill for £19,548. The bill followed a revaluation carried out by the Valuation Office Agency (VOA) in October 2021 and relates to an extra modular building on the school site, with the charge backdated to June 2018 when the additional building was completed.

The Working Group:

- a) *Noted the report;*
- b) *Supported an allocation of £19,548 being made from the Rate Reimbursement Policy to a Lancashire nursery school due to the circumstances described in the report.*

Subsequent to the working group meeting, the DfE confirmed that Lancashire billing authorities have decided not to introduce the new system in 2022/23 This means that schools should continuing with the existing payment processes where they pay their rates bill directly to their local council

This late change by the Government to the rates arrangements should have a limited impact on school budgets, as it simply continues the existing process and rates funding has been included in 2022/23.

Rates billing arrangements for schools funded from the High Needs Block and Early Years Block should also continue as they were in 2021/22.

The Forum:

- a) Noted the report and the further information provided;
- b) Ratified the working group's recommendations;
- c) confirmed the continuation of the Rates Reimbursement Policy into 2022/23, so that protection can continue for schools receiving larger rates bills than they received funding, subject to certain thresholds and the submission of a business case.

v. **Reforming how local authorities' school improvement functions are funded**

A verbal update was provided to confirm information shared with the Schools Forum at the January 2022 meeting. Previous reports to the Forum set out information on DfE proposals around 'Reforming how local authorities' school improvement functions are funded', which included a Forum response to the Government's consultation exercise.

The Lancashire grant allocation for 2021/22 equated to just under £2m and DfE proposals indicated that this would be reduced by 50% in 2022/23, potentially leaving a £1m shortfall in school improvement funding from April 2022.

The LA is still considering the implications of this grant cut and further information will be provided in due course.

The Working Group:

- a) *Noted the information.*

The Forum noted the report.

7. RECOMMENDATIONS FROM THE HIGH NEEDS BLOCK WORKING GROUP

A report was presented setting out the recommendations from the High Needs Block Working Group held on 1 March 2022.

A supplementary item is also included, which emerged after the working group meeting, and relates to Teachers' Pay Grant (TPG) and Teachers' Pension Employer Contribution Grant (TPECG) allocations.

i. School Census data – special school termly redeterminations

Following recommendations at the last working group, Forum special school members kindly circulating a request via LASSTHA for pupil number information at special schools to be completed on a LCC eform, in addition to school census, in order to facilitate timely termly redeterminations.

The LA has chased outstanding returns after the deadline and all but 2 schools have now responded. The LA aims to issue redeterminations in w/c 7 March 2022 and will use last terms data for these schools if they do not reply. Even though deadline has passed, the LA confirmed that it would be able to include their numbers if they were submitted by 4 March 2022.

The Working Group:

a) Noted the report.

At the Forum meeting it was confirmed that spring term redeterminations have been calculated and issued.

The Forum noted the report.

ii. High Needs Block Funding 2022/23

This information and associated recommendations had been covered in the Schools Block report.

iii. High Needs Supplementary Grant 2022/23

At the Schools Forum on 19 January 2022, information was provided about the Schools Supplementary Grant. The Grant allocation will include a government calculated element for mainstream schools, with £325m of the national total targeted for high needs funding, to be allocated locally, following discussion with the Schools Forum.

Following discussions with the Forum, it was agreed that the High Needs Supplementary Grant would be calculated in two parts:

- Health and Social Care Levy (Increased NI contribution in 2022/23 for social care)
 - Provided specifically to support special schools and PRUs;
 - To be calculated on 80% of total budget per school x 1.25% based on 2022/23 School Budget data;
 - This should broadly reflect the additional costs for the HNB schools, as circa 80% of total budgets are staffing and the employer NI contribution is increasing by 1.25%;
 - Prevents the need for extensive extra work and complex calculations;
 - Contribution for other schools included within mainstream grant;
 - Consideration of exceptional expansion at special schools and data point used regarding WPN values due to differentials between terms.
- Wider Cost Pressures
 - Uses remaining Grant, of circa £5.2m;
 - Paid across all sectors as one off payment or instalments;
 - Calculated on basis of WPNs in 2022/23 School Budget data;
 - For AP incorporates Excluded, Medical & Other Places + WPN above E2 (1.00 WPN);

- Equates to circa £600 per WPN, subject to confirmation of final allocations and distribution methodology.

Whilst the overall principles of the methodology were agreed by Forum in January 2022, the details of how the 'Consideration of authority commissioned expansions at special schools and the data point used regarding WPN values due to differentials between terms' in the calculations need to be finalised.

Having considered the issues, the following information was put forward for consideration:

- For special schools with authority commissioned expansions planned from the academic year 2022/23 due to LA projects, the 2022/23 School Budget data to be used in the NI increase calculation already has the revised September 2022 place numbers built into the budget for the place funding. The existing methodology is therefore already recognising an element of the additional costs that the schools will face in September 2022. However, the budget figures will not take account of the impact the additional pupils will have on the WPN figures or school specific calculations. It is therefore proposed to calculate the average costs per place at relevant schools based on the 2022/23 budget figures and multiply this by the increased number of places at September 2022. The 80% x 1.25% calculation will then be applied, to provide an estimate of the additional NI burden on these schools arising from the extra commissioned places that was not recognised in the standard Health and Social Care Levy calculation.

The calculation applied to 4 schools where LA commissioned expansions are taking places from September 2022 and is estimated to cost just over £4k in total. This will not substantially impact on the estimated overall costs of this element of the methodology, with the total calculation rising to marginally over £0.8m.

- In response to the WPN data point to be used in the methodology, the original proposal planned to use the Schools Budget 2022/23 data, which is taken from the October 2021 census.

An alternative solution would be to use May census data in the WPN calculations. The Summer term census is traditionally the high point in the academic year for pupil number/WPN values, especially for PRUs. The latest summer term data available before the start of the 2022/23 financial year is from May 2021. The high level WPN data was provided on both the October 2021 and May 2021 data:

The revised estimate of the High Needs Supplementary Grant for Lancashire is £6.2m, leaving circa £5.4m available for the wider costs pressures element of the methodology. The October 2021 data would therefore equate to circa £599 per WPN, with the May 2021 data providing circa £630 per WPN.

It was noted that the October 2021 data contains a larger number of WPNs overall, so reduces the value to be paid for each WPN. The May 2021 data contains a lower number of WPNs overall, so the factor can be increased proportionately. May 2021 data does however provide a higher WPN figure for PRUs.

The final WPN figures will also provide an adjustment for the special schools subject to the LA commissioned expansions, similar to that described above, but

without the NI percentage element, which will also impact on the final WPN factor to be allocated.

Members considered the proposals for distributing the High Needs Supplementary Funding and discussed the various options available. There was general agreement for a preference for the May 2021 census data to be used for the WPN calculations. However, members wanted to consult further with colleagues and officers before final decisions were taken, with some concern expressed about the possible adjustment methodology to post 16 commissioned place numbers in the authority commissioned expansions element of the arrangements. The need to use a single data point for calculations and have a methodology that could be applied across all sectors and settings was emphasised.

Officers asked that members hold discussions/collate any views by 17 March 2022 if possible, so that final decisions can be agreed at Forum, in time to implement payments from April 2022.

The Working Group:

- a) *Noted the report;*
- b) *Supported the use of May 2021 census data in the WPN calculation of the High Needs Supplementary Grant methodology;*
- c) *Representatives agreed to consult further with colleagues and officers before final decisions were taken about the possible adjustment methodology.*

Feedback received from following the working group meeting indicate that the chair of the working group special school heads after the working group on 1st March and asked for any comments or concerns. Only 1 school responded seeking to clarify their position Therefore assuming that the others are OK with the high needs supplementary grant proposed arrangements in respect of post16.

The Forum:

- a) **Noted the report and the further information provided;**
- b) **Ratified the working group's recommendations.**

iv. **Teachers' Pay Grant (TPG) and Teachers' Pension Employer Contribution Grant (TPECG) Allocations**

After the Working Group meeting, a High Needs Block issue has arisen, and information is included in this report for consideration by the Forum.

This issue relates to Teachers' Pay Grant (TPG) and Teachers' Pension Employer Contribution Grant (TPECG) Allocations.

The LA has been in discussion with an AP provider about the payment of TPG and TPECG in 2021/22. This has caused the LA to re-examine the DfE's High Needs Guidance for 2021/22.

Members will recall that for 2021/22 the DfE included funding in High Needs Block allocations to LAs that had previously been distributed via 2 specific grants to cover the costs of teachers pay and pension increases. Following discussions with the Forum, this additional funding was allocated to special schools/academies and PRUs/AP providers in Lancashire via an addition to the school specific factor in both formulae, at a rate of £660

per pupil. As the extra £660 was included in the school specific element of the formulae, it related to the pupil count and was redetermined each term.

Having reviewed the situation, the LA is now of the view that this methodology does not fully comply with the DfE guidance/conditions of grant, which specify that the allocations should be based on 'DfE funded places' and also incorporates a minimum payment threshold of 40 places.

As the original allocations did not fully comply with the conditions of grant, the LA will need to analyse the allocations to determine adjustments.

The 2021/22 High Needs Block TPG and TPECG funding has been recalculated using the 'place' methodology, with some 18 schools/PRUs generating higher allocations and 21 resulting in lower allocations.

As this issue has emerged so late in the 2021/22 financial year it would be inappropriate to reduce allocations for schools where the place methodology generates a lower amount, so the LA intends to honour the original allocations.

For those schools with higher place methodology allocations, a supplementary allocation will be issued shortly, to ensure that the allocations from the corrected amounts can be included in the 2021/22 year end accounts. The largest increase for a special school is circa £23k, and for a PRU, circa £14k.

Members will recall that Forum has already agreed that no clawback mechanism should be applied on school balances at 31 March 2022, so this late allocation does not create any clawback issue for schools.

The costs of the payments to the 18 schools entitled to the higher allocation under the place methodology, plus the original AP provider that raised the query, is just over £200,000.

2022/23 TPG and TPECG Allocations

The 2022/23 HNB guidance and conditions of grant contain similar TPG and TPECG requirements. However, as the correction of 2021/22 allocations has only recently been finalised, the original 2022/23 special school and PRU budget statements, issued on 21 February 2022, included TPG and TPECG allocations calculated on the 'school specific' methodology.

The LA will need to recalculate these 2022/23 allocations to ensure compliance with DSG conditions of grant, however, as the 2022/23 financial year has not yet commenced, the Forum's views were now sought on the options available. Options could be:

- Revise funding models, recalculating the TPG and TPECG allocations for 2022/23 and issue revised budget statements to all special schools and PRUs and, as the new financial year has not yet commenced, expect the schools to factor the revised allocations into their 2022/23 individual school budget proposals.
- Inform all special schools and PRUs of the revised calculations, however, as 2022/23 budget statements have already been issued, then honour allocations that would be lower, and increase allocations that are higher using the 'place' methodology. Uplifted 2022/23 allocations would need to be calculated and paid

in March 2023, but initial estimates suggest that around half the schools would again be eligible for higher allocations, with a total amount of circa £200k to be underwritten by the DSG reserve.

2023/24 TPG and TPECG Allocations

The LA will update the 2023/24 HNB funding models to incorporate the TPG and TPECG place based allocation methodology after reviewing updated DfE high needs guidance for 2023/24.

It was confirmed that since papers were issued, 2021/22 adjustments have been allocated to relevant schools.

The Forum:

- a) **Noted the report;**
- b) **Recommended that the option to honour the Teachers' Pay Grant (TPG) and Teachers' Pension Employer Contribution Grant (TPECG) allocations that would be lower and increase allocations that are higher using the 'place' methodology in 2022/23.**

8. RECOMMENDATIONS FROM THE EARLY YEARS BLOCK WORKING GROUP

A report was presented setting out the recommendations from the Early Years Block Working Group held on 8 March 2022.

i. Early Years Block Funding 2022/23

At the Schools Forum on 13 January 2022, decisions and recommendations about the 2022/23 Schools Budget were agreed.

In connection with the Early Years Block, the Forum unanimously supported the 2022/23 Early Years Block proposals that had been recommended by the working group. On 20 January 2022, the County Council's Cabinet formally approved the Schools Budget for 2021/22.

Some elements of the Schools Budget require compliance checking by the ESFA and approval was received on 15 February 2022.

Early Years budget statements for 2022/23 were prepared and issued on 21 February 2022.

The Working Group:

- a) *Noted the report.*

The Forum noted the report.

ii. Impact on Early Years settings on EEF as a percentage of total sales EEF Early Education Funding

A presentation was considered about the impact on Early Years settings of EEF Early Education Funding as a percentage of total sales, which had been prepared by the working group chair.

The presentation provided information on the Costs and Income changes in Early Years settings. The analysis indicated that for 2022/23 there would be a 7.1% increase in

costs but only a 3.5% increase in government funding. Further analysis was shared assessing the impact for settings depending on their percentage of EEF compared to their total income and on the historic comparison of funding rises compared to cost pressures.

A summary of the impact included:

- Settings with a high percentage of EEF can't increase parent fees to cover government shortfall.
- Under 2's and all other parents paying fees are subsidising the shortfall in EEF.
- The low level of government EEF increase means that most settings are going to be short of income.
- Whole sector is experiencing huge increase in children with SEND etc where settings need unfunded extra staff but cannot obtain or afford them.
- Many settings are not making a surplus.
- Make cost reductions or charge more for extras to stay in business.

Members discussed the ongoing problem of underfunding in the sector and compared this to Wales where rates were increasing to £5 per hour from April 2022, plus £9 per day towards meals. There was also full remission of business rates for early years providers.

Concern was expressed that the level of funding provided by the Government would soon begin to reduce the quality of provision in the county. Currently 98% of Lancashire providers were rated good or outstanding by Ofsted, but this would be unsustainable if funding were not significantly increased.

Officers, in consultation with the Working Group Chair, planned to send a letter from the county council to Lancashire MPs to highlight the underfunding for the sector, and it was also agreed that this matter would again be raised at the regular sessions the county council held with the DfE.

The Working Group:

- a) Noted the report;*
- b) Expressed significant concern about the underfunding of the early years sector in Lancashire and the inevitable impact this would have on the quality of provision;*
- c) Supported the actions to raise awareness of this funding issues further with MPs and DfE.*

The Forum ratified the working group's recommendations.

i. LCC Family Safeguarding model

The Federation of Lancashire Nursery Headteachers had asked that an issue could be raised at the Schools' Forum on the role of Early Years settings in the LCC Family Safeguarding model.

In the Family Safeguarding model Early Help and Support is provided by settings. This has brought additional workload, particularly for those settings located in areas of deprivation providing education for Lancashire's most vulnerable children. Early Years settings are already stretched, often working precisely on ratio. There is no funding for Early Years settings to cover the additional workload. Although other sectors may also feel the pressure of providing Early Help and Support, they receive considerably more in Pupil Premium to be able to provide the necessary family support.

Headteachers have said that school staff are increasingly being allocated as the Lead Professional. The feeling is that this is a family support worker role, but most schools don't have that post, and can't afford to create that post, so it falls on the headteacher/DSL. Settings in areas of high deprivation will see more families requiring support due to the effects of deprivation. Covid has worsened the stresses on families which further increase the workload.

The issue is very similar to that previously raised by the PVI sector.

It was noted that settings are fully supportive of the Family Safeguarding model because they have the children's best interests at heart but would welcome consideration of the issues by Schools Forum.

All members recognised the concerns that were highlighted, and officers agreed to arrange a meeting with the Head of Service for Child Protection/Children in Need (Family Safeguarding) to directly discuss the issues raised.

The Working Group:

- a) *Noted the report;*
- b) *Supported the proposed meeting with LCC officers to directly discuss the issues raised.*

The Forum ratified the working group's recommendations.

ii. SEN in Early Years

A further issue was raised about the level of funding available in the sector to support children with SEN.

Members reported that the situation they faced was getting increasingly worse as more children presented with SEN after the pandemic and funding generally was already stretched.

It was noted that Lancashire passported all the early years funding received from the government to Lancashire providers and that increases in the SEN Inclusion Fund for example would reduce funding available for base rates.

Officers confirmed that it was intended to consult the sector ahead of the 2023/24 financial year to obtain feedback about the balance of factors in the Lancashire early years formula and these views could influence decisions about future funding arrangements.

A more general survey of the sector was also to be issued shortly to obtain feedback from the sector and this would include feedback about the SEN pressures on settings.

Members were aware that a subgroup held regular meetings with Inclusion Service colleagues, and it was proposed that the invitation to the next meeting of this group could be extended to the wider Working Group membership to enable colleagues to hear directly from the service and discuss options available. Feedback was provided that a service restructure was underway and early years officers had been involved in the recruitment process to ensure appointees had relevant early years experience and focus. The possibility of future use of High Needs Block funding to support the pressures on SEN children in the sector was raised and it was noted that discussion with the Inclusion Service would be needed first to formulate any policy considerations.

The Working Group:

- a) *Noted the report;*
- b) *Supported the concerns raised about the pressures on SEN funding in the sector;*
- c) *Supported the wider invitation to the next SEN Inclusion meeting to facilitate wider discussions with the service.*

The Forum ratified the working group's recommendations.

iii. Childminders and Covid rules

Information was provided about the current Covid rules for childminders which include

- A childminder can accept a child with Covid into their home
- A parent with Covid can come to the home to drop off their child
- If the childminder or a household member has Covid they have to close
- But the household member can still go to work or school
- The childminder does not need to self-isolate
- This only applies to childminders and not other EY settings.

The LA has raised the inconsistencies in this guidance with the DfE.

The DfE response was shared with the working group and the response did add that the DfE is aware of the issue and discussions are ongoing with UKHSA with an update expected for 1 April.

Officers confirmed that there were some temporary workarounds available for childminders but that these were not that easy to action and had not been taken up in Lancashire.

The Working Group:

- a) *Noted the report.*

The Forum ratified the working group's recommendations.

iv. PVI Deprivation rates for 22/23

At the Forum meeting, a verbal report was provided about an issue that had emerged with the deprivation factor on PVI budget statements, where incorrect data had been supplied for use in the calculation.

Analysis (which was subject to final confirmation) suggested that when the factor is recalculated using correct data, 503 of 934 providers have a changed deprivation rate.

Using the correct data added circa £225k to 250k the EY block budget forecast (this is the correct figure that would have been included in the approved budget forecast had it been available).

The LA will contact providers affected by the change and include details of their specific rate change.

Feedback from the Forum was sought on the principle to be applied to the correction.

- Option 1: Simply apply the correct data meaning that the deprivation forecast for 503 settings will change, either up or down.
- Option 2: Use the corrected calculation for settings where the value of the deprivation factor will increase but honour the original deprivation level where the corrected data results in a reduction. This would protect 159 settings for 2022/23 only . The cost of the protection is estimated at between circa £70k and £80k, which would be underwritten by the DSG reserve.

Members considered the information and supported the use of option 2, to honour the original deprivation level where the corrected data results in a reduction. It was note that this was the principle that had been applied to the teachers pay and pensions calculation in the high needs block

The Forum:

- a) Noted the information provided;**
- b) Supported the use of option 2, to honour the original deprivation level where the corrected data results in a reduction.**

9. RECOMMENDATIONS FROM THE CHAIRS' WORKING GROUP

A verbal report was presented setting out the recommendations from the Chairs' Working Group meeting held on 17 March 2022.

i. Bid to Schools in Financial Difficulty (SIFD) for one off financial support

Information was provided about a SIFD bid relating to a Lancashire primary school that has fallen into a deficit budget. A number of issues have contributed to the deficit position, but a significant factor has been the cost of the nursery classes at the school.

In response to the deficit, the school has been working with the county council to improve the financial position of the school.

A recovery plan has been agreed by the school management and governors, and incorporates a number of components, which were shared with the group.

In addition, a key factor in the recovery plan related to the closure of the maintained nursery provision on the site, which is a financial drain on the school budget. The recovery plan forecast savings from this would accrue from December 2021, but due to delays outside of its control the earliest implementation date is now estimated to be Easter 2022.

The rescheduling of this element of the recovery plan has impacted on the financial position of the school and due to the lack of resources in the LA to progress the closure, has delayed savings of circa £22k.

Based on the information supplied, the LA believes that a contribution of £22,000 from the Schools in Financial Difficulty (SIFD) budget, to support the school in closing the nursery provision would be appropriate. This would be subject to the normal SIFD bid conditions that the school commit to a recovery plan that shows the school will achieve an overall balanced budget within 3 years.

As at 31 March 2021, the outturn position of the school was a deficit of (£83,816). The £22,000 SIFD bid is therefore well within the maximum bid level of 33% of the relevant deficit.

The Chairs' Group:

a) Noted the information provided;

b) Recommended the allocation of £22,000 from the Schools in Financial Difficulty (SIFD) budget for a Lancashire primary school in deficit.

The Forum ratified the Working Group's recommendations.

10. URGENT BUSINESS

No matters of urgent business have been considered since the last meeting.

11. FORUM CORRESPONDENCE

A report was presented about the Forum related correspondence received since the last meeting.

i. Correspondence from a Lancashire Special School

At the last Forum meeting in January 2022, correspondence from the Chair of Governors at a Lancashire special school was reported. The letter related to the implementation of a 'damage policy' in connection to 'children looked after' that attend the school.

Following discussions with the Forum Chair and officers, it was judged that decisions about the application of the policy were a matter for the county council, as corporate parent for the 'children looked after' and a response was sent to the Chair of Governors (CoG) to confirm that the correspondence had been forwarded on to county council relevant officers to consider a response.

Officers subsequently looked into the matter and held a meeting with the Headteacher and CoG of the school. Correspondence from Edwina Grant OBE was then sent to the school.

A letter from Edwina was also sent to the Forum Chair setting out the outcome of the discussions.

ii. Correspondence from the Cabinet Member for Education & Skills

After the Forum meeting on 19 January 2022, the Forum Chair wrote to the Cabinet Member for Education & Skills and the Leader of the County Council, setting out the Forum's decisions and recommendations regarding the Schools Budget 2022/23. This correspondence formed part of the County Council Cabinet's consideration of the Schools Budget on 20 January 2022.

A letter, dated 21 January 2022, was received by the Forum Chair from County Councillor Jayne Rear, Cabinet Member for Education & Skills. A copy of the letter is provided at Appendix A to the report, which thanked Shaun for his correspondence and asked that the thanks of the Cabinet Member and the Leader be passed on to all members of the Forum for their hard work to help set the budget this year.

The letter confirmed that the Cabinet had accepted the Forum's recommendations when setting the Schools Budget for 2022/23.

The Forum:

- a) **Noted the correspondence.**

12. ANY OTHER BUSINESS

a) Ukraine Refugees

A matter of AOB was raised by Brian Rollo asking if the County Council was aware of any refugees arriving in Lancashire from Ukraine and if so, how any influx of children may be handled? The AOB had been notified ahead of the meeting and enquiries have been made to the relevant LCC

The response indicated that at this point the county council do not know how many Ukrainian refugees might arrive in Lancashire. The Government had issued some details of the Homes for Ukraine Scheme. The scheme is uncapped, so there is no limit on the number of refugees who might arrive. LCC are expecting that additional funding will be provided so that wrap around support can be provided to families, but at this point guidance on the role of local authorities and partners has not been published.

LCC is aware that, dependent on the numbers of families who arrive in Lancashire, there will be pressures in our communities and services, including access to education, that may mean we have to reimagine what is able to be delivered. The Refugee Integration Team has initial planning meetings with county council services, including children's services, to begin to establish how we can best provide support as a whole system.

b) Teacher Training (QTS) using the Apprenticeship Levy- last call for applications!

Following the report from the Apprenticeship Levy team at the last meeting, members were reminded that LCC will be starting the programme for new applicants to start on 1 July 2022 with our new delivery partner for 2022, Ripley St Thomas SCITT. Training will take place in central Preston - making it accessible for everyone.

Places for the teacher training apprenticeship will be limited due to the high popularity with this programme, and the closing date for applications is 31 March 2022. Any interested members were asked to contact james.beardwood@lancashire.gov.uk.

The Forum:

- a) **Noted the information provided;**
- b) **Asked to be kept informed about support for Ukrainian refugees.**

13. DATE OF FUTURE MEETINGS

To note that the next scheduled Forum meeting will be held at 10.00am Tuesday 5 July 2022. Arrangements for the meeting will be confirmed in due course.

LANCASHIRE SCHOOLS FORUM

Date of meeting 5 July 2022

Item No 6

Title: Lancashire County Council's Education Strategy 2022-2025 and Team Around the School and Settings

Appendix A refers

Executive Summary

This report provides information on the County Council's Education Strategy 2022-2025 and Team Around the School and Settings

Forum Decision Required

The Forum is asked to:

- a) Note the report;**
- b) Express any views on the Education Strategy 2022-2025 and Team Around the School and Settings**

Background

Julie Bell, Director of Education, Culture and Skills and /or Delyth Mathieson, Head of Service Education Improvement will attend the meeting to present a verbal update on this item.

The Education Strategy for 2022-2025 sets out the county council's ambition for all children and young people in Lancashire, regardless of their starting point in life, to have access to quality learning that will enable them to thrive and develop the life skills to support them into a productive and happy adulthood.

A copy of the Strategy is attached at **Appendix A**. The document:

- Contains a foreword by CC Jayne Rear, Cabinet Member for Education and Skills Lancashire County Council;
- Outlines five priorities for the county;
- Is underpinned by 'seven pillars' to clearly demonstrate shared responsibilities across partner agencies that will help drive the joined-up approach to education in Lancashire.

Key to the strategy is **Team Around the School and Settings (TASS)**, which is an approach that involves local partners, networks and children specialist professionals to help identify patterns, address strategic issues, help make improvements and ultimately achieve the very best outcomes for all children and young people in Lancashire.

As previously requested by the Forum, further information on Team Around the Schools and Settings is available [here](#).



Lancashire Education Strategy

2022 – 2025

Foreword



Jayne Rear

County Councillor Jayne Rear
Cabinet Member for
Education and Skills
Lancashire County Council

Lancashire is a large and wonderfully diverse county, with more than 177,000 pupils at 628 schools. Lancashire County Council is the fourth largest local authority in the country, with a plethora of opportunities and our fair share of challenges.

Lancashire County Council's vision is to help make Lancashire the best place to live, work, visit and prosper, and our new Education Strategy sets out how we intend to make that happen for our children and young people.

We have high aspirations for all our children, whatever their starting point. Access to quality learning from childhood through to adulthood enables children to thrive and develop the life skills that will support them into a productive and happy adulthood.

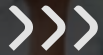
The Education Strategy for 2022-2025 sets out our ambition for our children and young people and how we intend to fulfil our responsibilities in providing them with everything they need to go forward and do fantastic things with their lives.

We are making it our mission to improve access, quality and outcomes for all children and families in our county in the next three years. By working with our partners, we will do all that we can to drive educational excellence and get all schools to, at the very least, an Ofsted judgement of 'good'.

We want to ensure sufficient childcare for all children who meet the criteria and school places for all children, as well as aligning services, schools and settings to address barriers to learning and recognise the individual needs of both children and communities to tailor the educational support we provide.



Our Partnership Vision



Children, young people and their families are safe, and achieve their full potential.

Lancashire Children, Young People and Families Partnership Vision



Education Strategy Mission Statement



'In Lancashire, we have high aspirations for all our children and young people, whatever their starting point. Access to a quality learning pathway, from childhood through to adulthood, enabling them to thrive and develop the life skills that will support them into a productive and happy adulthood, is at the root of our council ambition to ensure that children of all abilities do well in our schools and colleges gaining important skills and expertise for life.'



Our Purpose

There are key elements that the Local Authority has to do regarding education, and these are set out within The Education Act. In summary, the statutory duties can be summarised under three key headings:

Access

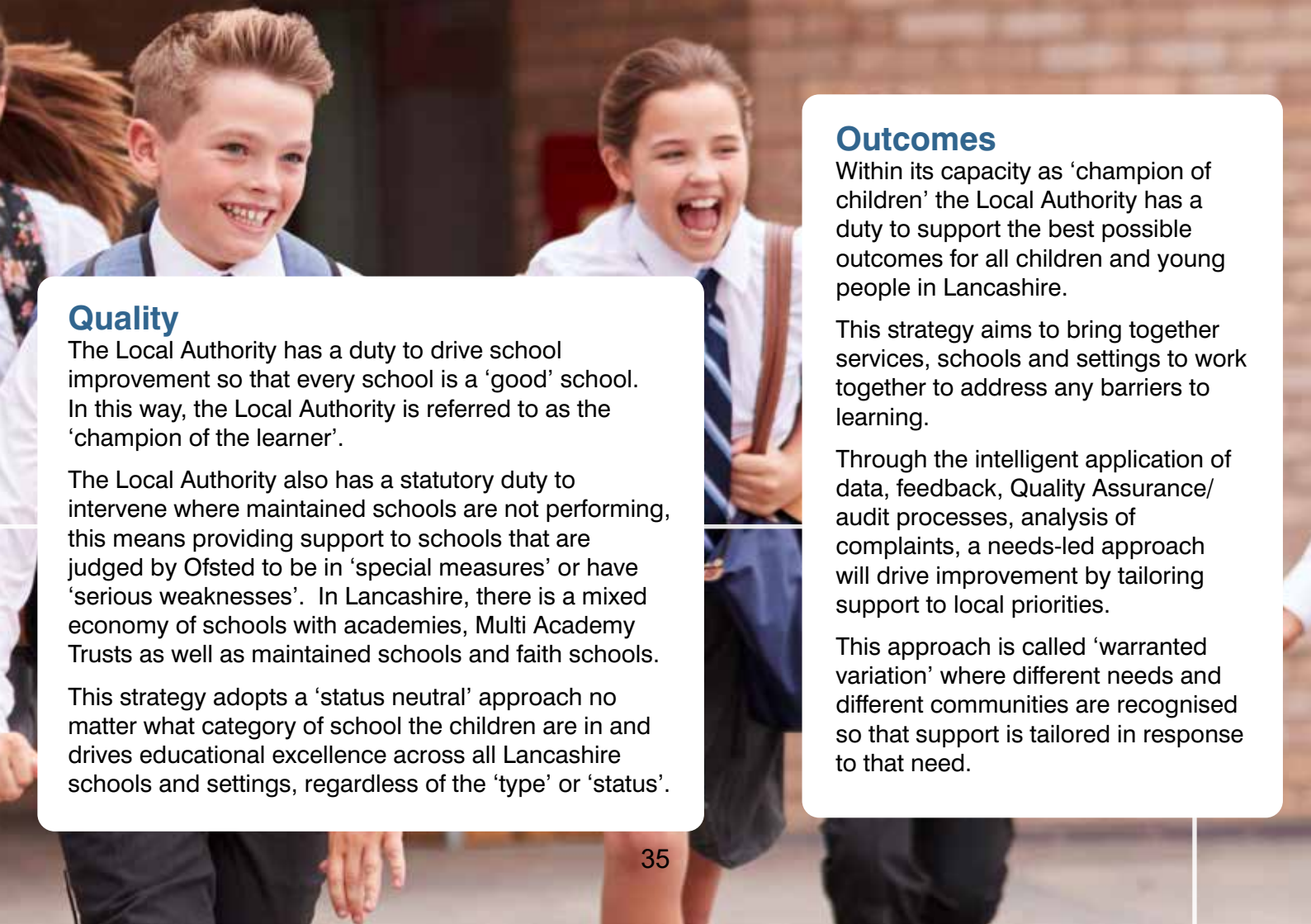
This relates to our 'sufficiency duty' where all children of statutory school age are entitled to education across a range of placements sufficient to meet their needs.

This duty relates not only to schools but also to the universal early years entitlements offer for all 3- and 4-year olds and our duty to have sufficient places for disadvantaged 2-year-olds and the 3 and 4-year-old extended 15 hours for working parents.

What this means is, the Local Authority must ensure that there are sufficient childcare and school places for all children meeting these criteria.

This duty also relates to special school places and access to alternative provision for children who either for medical or behavioural reasons are unable to access full-time education at times.





Quality

The Local Authority has a duty to drive school improvement so that every school is a 'good' school. In this way, the Local Authority is referred to as the 'champion of the learner'.

The Local Authority also has a statutory duty to intervene where maintained schools are not performing, this means providing support to schools that are judged by Ofsted to be in 'special measures' or have 'serious weaknesses'. In Lancashire, there is a mixed economy of schools with academies, Multi Academy Trusts as well as maintained schools and faith schools.

This strategy adopts a 'status neutral' approach no matter what category of school the children are in and drives educational excellence across all Lancashire schools and settings, regardless of the 'type' or 'status'.

Outcomes

Within its capacity as 'champion of children' the Local Authority has a duty to support the best possible outcomes for all children and young people in Lancashire.

This strategy aims to bring together services, schools and settings to work together to address any barriers to learning.

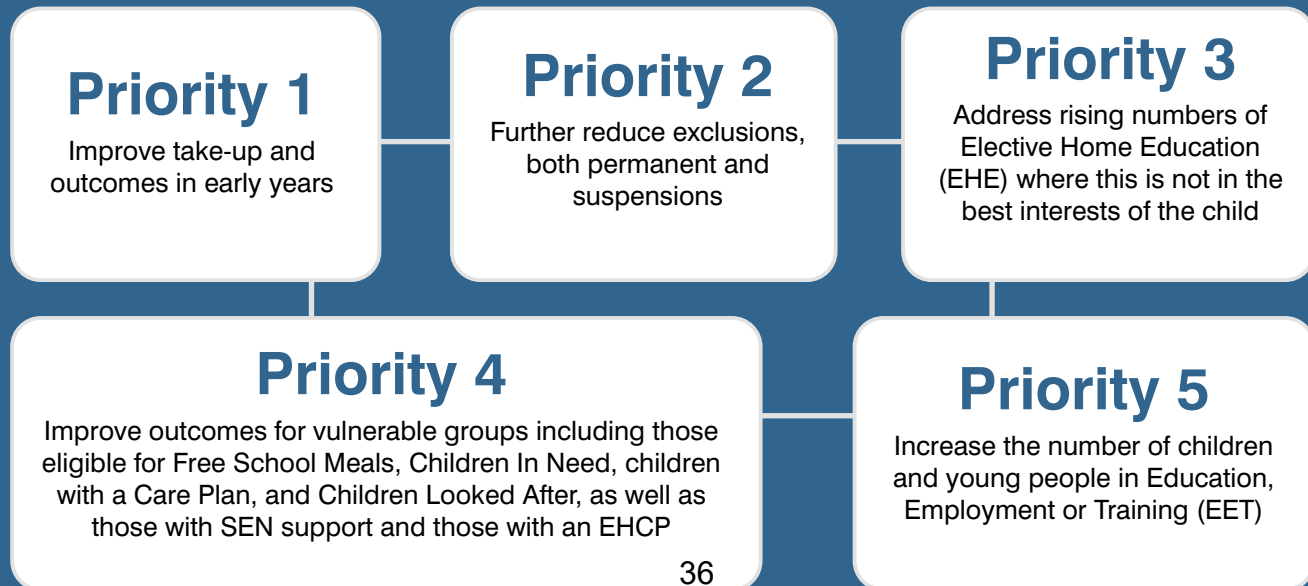
Through the intelligent application of data, feedback, Quality Assurance/audit processes, analysis of complaints, a needs-led approach will drive improvement by tailoring support to local priorities.

This approach is called 'warranted variation' where different needs and different communities are recognised so that support is tailored in response to that need.

Our improvement priorities

We will continue to focus on addressing the inequity of experience across the County by adopting a warranted variation locality approach. Using data intelligently, working with schools and settings, support will be targeted to ensure that there is a partnership approach to delivering 5 key priorities aligned to the 4 corporate priorities.

Five key priorities



Our Corporate Priorities 2021 - 2025

Our Vision

Here at Lancashire County Council we are helping you to make Lancashire the best place to live, work, visit and prosper.

Our Values

Supportive, Innovative, Respectful, Collaborative.

Our Partnerships

Through collaboration with partners and the sharing of ideas, assets, skills and knowledge, we will create a future for Lancashire that better meets all our needs.

Our Communities

We value local communities and will help them to provide care and support to their families, friends, neighbours and colleagues.

Our Accountability

We will ensure good governance, strong performance management, prudent financial control and transparent decision making for the taxpayer.



DELIVERING BETTER SERVICES

- Provide services that are effective, efficient and appropriate to local circumstances.
- Improve services by changing the way we do things.
- Help people and families live healthier lifestyles and enjoy a better quality of life.



CARING FOR THE VULNERABLE

- Protect, safeguard, support and enable the most vulnerable residents in our society.
- Challenge and reduce areas of inequality and provide opportunity for all.
- Ensure children of all abilities do well in our schools and colleges, gaining important skills and expertise for life.



PROTECTING OUR ENVIRONMENT

- Lead on environmental improvement schemes and renewable energy initiatives.
- Work with businesses and communities on flood prevention, decarbonisation projects and climate change resilience.
- Promote more recycling and better waste management.



SUPPORTING ECONOMIC GROWTH

- Develop and build effective infrastructure and transport networks, to help people and businesses connect and grow.
- Secure inward investment, to boost and level up the county.
- Invest in skills and innovation, to secure economic growth and maximise Lancashire's potential.

Seven Pillars



There are seven pillars which make clear the interdependencies across parallel pieces of work that will help to drive a joined-up approach to education in Lancashire. These seven pillars underpin the Education Strategy and have their own aims and objectives to support the delivery of this strategy.

The seven pillars are:



Multi-Agency Early Help

Early Years

SEND Improvement

Alternative Provision

School Effectiveness

School Place Planning

Preparation for Adulthood



What will success look like?

Locality gaps and underperformance will be addressed through strengthening local area prioritisation and planning in relation to school improvement and outcomes.

Improved family engagement in learning will be achieved through Team Around the School and Setting approach to support early years uptake and learning.

Governors are confident that Education Improvement and Governor Services are supported and have effective development opportunities to ensure strong and robust leadership and accountability across schools and settings.

Parents are confident that local mainstream schools are identifying and meeting their children's needs through the early identification of SEND and ensuring timely access to relevant support and intervention.



What will success look like?

Commercial services to schools provide a coherent traded offer which reflects the changing needs of schools and reflect increased academisation.

The prevalence of pupils from vulnerable groups suspended or excluded will be reduced.

The number of pupils who are suspended or excluded will reduce through the review and development of inclusion hubs and specialist support/ Alternative Provision outreach.

Families new to Lancashire report that they are supported in making a positive start to their life here to gain a sense of belonging and the opportunity to settle.

How will the Education Strategy deliver improvement?



Working in collaboration, the services within the Council combined with the services and partners within the Team Around the School and Settings (TASS) locality groups will listen to the voice of children, young people and their families in order to deliver the aspirations articulated within this strategy and realise the shared ambition for all children and young people set out within the vision statement.

The Education Strategy sets out the aspirations for education in Lancashire but the context in which the strategy is delivered will shift year on year. For this reason, the Education Strategy will be supported by an annual delivery plan. The priorities within the annual delivery plan will be informed by data, local intelligence and the lived experiences of children young people and their families. They will be agreed with sector representatives across early years, primary, secondary, post 16 and special schools at the Lancashire Education Partnership Group.

The Education Scrutiny Committee will receive a copy of the delivery plan at least annually to scrutinise and challenge performance against the targets agreed at the Lancashire Education Partnership Group.

The Education Strategy itself will be reviewed on a three yearly basis and so the term of this strategy is from 2022 to 2025.





Our pledge to
ensure all our
children get the
right support, in
the right place,
at the right time.

>>>



- We will produce an annual delivery plan identifying clear aspirational yet achievable outcomes, measures, and timeframes.
- Our annual plan will identify how we will work to create the better future through:
 - o Strong leadership, management and governance structures across the partnership that will drive the work of the Education Strategy forward providing quality and assurance
 - o Ensuring stakeholders are fully engaged and involved, and interests taken into consideration
 - o Continuing to build on our strong teams and structures
 - o Developing policies, practices and processes that reflect the changing needs of our communities, guided by data, evidence and the experiences of children, young people, and their families
 - o Working together to develop systems and improve our use of digital tools to shape the way we work together to share information to improve outcomes



LANCASHIRE SCHOOLS FORUM
Date of meeting 5 July 2022

Item No 7

Title: Recommendations of the Schools Block Working Group

Appendices A-D refer

Executive Summary

On 21 June 2022, the Schools Block Working Group considered a number of reports, including:

- 2021/22 Schools Budget Outturn Report;
- School Balances and Clawback 2021/22;
- Schools Forum Annual Report 2021/22;
- : De-Delegation Proposals 2023/24;
- Completing the reforms to the National Funding Formula: Government consultation response;
- Schools Bill 2022;
- Implementing The Direct National Funding Formula Consultation;
- Scheme for Financing Schools in Lancashire;
- Schools Supplementary Grant 2022 to 2023;
- Growth Fund Policy Update;
- Split Site Funding Appeal.

A summary of the information presented, and the Working Group's recommendations are provided in this report.

Recommendations

The Forum is asked to:

- a) **Note the report from the Schools Block Working Group held on 21 June 2022;**
- b) **Ratify the Working Group's recommendations.**

Background

On 21 June 2022, the Schools Block Working Group considered a number of reports. A summary of the information presented, and the Working Group's recommendations are provided below:

1. 2021/22 Schools Budget Outturn Report

This report provided the Working Groups with details of the 2021/22 Schools Budget final financial outturn position, in relation to each funding block. A copy of the full report presented to the working group is provided at **Appendix A**.

The Overall Schools Budget outturn position for 2021/22 showed an underspend of circa £8.4m.

Further details were provided in connection with each funding block and members concentrated on the Schools Block and Central School Services Block positions. It was noted that the outturn position for the 2021/22 Schools Block revealed a circa £0.4m underspend. Some key highlights included:

Maintained Schools/Academy Recoupment

The total Schools Block expenditure on maintained schools for 2021/22 underspent by circa £3.0m which is mainly due to academy recoupment increasing by circa £2.4m during the year, as schools converted to academies.

The remaining variance of circa £0.6m, the difference between the 2 figures, is mainly due to an underspend on the growth fund.

It was noted that the budget and actual figures incorporate the agreed £2m transfer from the Schools Block to the Early Years Block.

Rates Rebates

The rates rebate budget estimated a £75k level of income from rateable value challenges throughout the year, but there was actually net expenditure of around £125k against this budget line, giving a total variance of just over £200k. Expenditure relates to a contribution to the LCC Estates team to facilitate the school rateable value challenges and the payment of rates rebates to schools in accordance with the Forum policy.

Members noted that the outturn position on the rates rebates budget for 2020/21 was a circa £86k overspend, but the budget generated a circa £500k surplus in 2019/20. As we are at the end of the current ratings cycle, there are reduced opportunities for rateable value appeals, but over the lifetime of the current schools forum policy, the arrangements had generated significantly more income than has been paid out.

The Working Group is asked to:

- a) Note the report and the 2021/22 Schools Budget final financial outturn position.**

2. School Balances and Clawback 2021/22

This report set out the year end position of schools' delegated budgets at 31 March 2022. A copy of the full report presented to the working group is provided at **Appendix B**.

The final outturn position against schools delegated budgets at 31 March 2022 was an underspend of £5.173m. This meant that school balances had increased by £5.173m in 2021/22, to a total of £95.325m.

Further details were provided, and members concentrated on the Schools Block schools. It was noted that, in total 21 schools were in deficit at March 2022, the lowest number since March 2015.

It was also noted that the year end position did include grant funding from DfE that was allocated on an academic year basis and analysis provided by schools about their year end position at 31 March 2022 indicated that circa £28m of total balances are classed as 'committed'.

School Balances and Clawback Policy 2022/23

Whilst clawback has been suspended on year end balances at March 2020, 2021 and 2022, the guideline balance policy remained unchanged, as follows:

- 12% of Consistent Financial Reporting (CFR) income for all phases of maintained school
- A £60,000 minimum balance threshold will be applied.

The group were asked to consider the school balances and clawback policy to be applied at 31 March 2023. A number of schools balances and clawback options were available, and the group considered the possibilities. Individual members spoke both for and against the reintroduction of clawback, and highlighted various issues, including the reduced impact of Covid on school funding, but the increased inflationary costs pressures facing the sector.. In addition, the number of schools with 12% balances or over was emphasised, although it was noted that this did not take account of DfE grants allocated on an academic year basis, which would be excluded from clawback, the level of committed balances in year end reserves, or the fact that schools would take different spending decision if a clawback mechanism was in place.

Clawback Exemption Request 2022/23

Members also considered an exemption from clawback for a Lancashire secondary school that has been saving funding towards a sports hall. .

Schools Budget Reserves 2021/22

The 31 March 2022 position on Schools Budget Reserves was also considered, and it was noted that the total of all schools reserves was £126.872m, an increase of circa £16m.

Members considered questions posed around the School Teaching and Support Staff Supply Reimbursement Scheme reserve, which ended the year with an underspend of circa £0.4m, leaving an outturn position of circa £2.3m. The overall in year position includes a surplus on the teacher scheme of just under £0.6m, which was offset by a circa £0.2m deficit on the support staff scheme.

The Forum had previously agreed that any year end balance above £1.25m should be redistributed to scheme members. The working group considered if £1.25m remained an appropriate maximum level for the reserve or if it should increase to say £1.5m.

Members discussed key issues highlighted in the report and made a number of recommendations.

The Working Group:

- a) **Noted the report;**
- b) **Noted the overall position on school balances at 31 March 2022, including the individual school level information provided in the report;**
- c) **On balance, recommended that clawback of revenue balances above the guideline figure should be reinstated at 31 March 2023, at previous levels:**
 - **A clawback rate of 50% is to be applied to any balance above guideline in the first year a school exceeds the guideline (after adjusting for exemptions);**
 - **A clawback rate of 100% is to be applied to any balance in excess of guideline where the guideline has been breached for two or more consecutive years (after adjusting for exemptions);**
(Note: As clawback was suspended in 2021/22, no school would be subject to the 100% clawback rate in 2022/23).
- d) **Recommended that the minimum balance threshold of £60,000 be increased, to offer greater protection for small schools, to £70,000 or £75,000;**
- e) **Recommended that the reintroduction of clawback be kept under review to assess the impact on Lancashire schools;**
- f) **Supported a clawback exemption applying to a Lancashire secondary school saving towards a sports hall project;**
- g) **Noted the underspend on the supply scheme budget at 31 March 2022 and recommended that the level of scheme reserve be increased to £1.5m and any funding in excess of this at March 2022 be reimbursed to scheme members, on the basis of contribution levels to the teaching staff scheme only.**

In connection with recommendation d) above, officers are recommending that the minimum balance threshold be increased to £75,000 for 2022/23, which will rebase the value to a level broadly equivalent to that when the threshold was last increased.

3. Schools Forum Annual Report 2021/22

Each year the Schools Forum publishes an annual report setting out items of business in which the Forum has been involved

A draft report for 2021/2022 was presented for consideration, and the HNB issues were highlighted.

The Working Group:

- a) **Noted the report;**
- b) **Recommend to the Schools Forum that the 2021/22 Annual Report be approved for publication.**

A copy of the final version of the 2021/22 Annual Report is provided at Appendix C.

4. : De-Delegation Proposals 2023/24

At this point, it is anticipated that the school funding framework will continue to allow service de-delegations in 2023/24. Funding for de-delegated services must be allocated through the schools block formula but can be de-delegated for maintained mainstream primary and secondary schools. The DfE's operational guidance for 2023/24 will normally be issued in July 2022 and will confirm the final funding arrangements from April 2023.

De-delegations must be approved on an annual basis by the Forum and be subject to consultation with maintained primary and secondary schools.

In accordance with normal practice, it is envisaged that a de-delegation consultation will be issued to maintained primary and secondary schools in early September 2022, with responses being reported to the meeting on 18 October 2022, at which time the Forum will be asked to make formal decisions, by phase, on each de-delegation proposal.

In 2022/23, the Forum formally approved 4 service de-delegations, relating to:

- Staff costs – Public Duties/Suspensions
- Heritage Learning Service - Primary Schools Only
- Support for Schools in Financial Difficulty
- Inclusion Hubs - Primary Schools Only

Relevant de-delegations were also offered to nursery schools, special schools and PRUs as pooled services buy-backs.

For 2023/24, the LA is again proposing to consult on the continuation of these four services as de-delegations, plus possibly a fifth service relating to school improvement activity. Further information was provided on each service.

1. Staff costs – Public Duties/Suspensions

In recent years the 'Staff costs – Public Duties/Suspensions' de-delegation proposals included various options around the treatment of trade union duties, including:

- a) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation using the existing policy
- b) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation but with a reduced Trade Union Facilities Time contribution to reflect a smaller workforce
- c) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation but without any Trade Union Facilities Time contribution
- d) Completely discontinue the 'Staff Costs - Public Duties/Suspensions' de-delegation

In considering this de-delegation each year, the Forum has also asked for information arising from an annual review of the trade union facilities time agreement and the latest report, which had been produced by Schools HR colleagues, and was provided for members. The report included information about the historical position of the facilities time agreement, the legal

requirements, recent union amalgamations and number of school staff supported from the de-delegation and how this has changed in recent years.

A further issue identified with Forum in relation to the 2022/23 de-delegation for this service related to the charging methodology, which originally utilised a per pupil rate plus a lump sum.

Members agreed that the original methodology disadvantaged small schools where the lump sum element generated a much larger proportion of the overall costs to individual schools. This was particularly evident in the primary phase. However, to reduce the turbulence in moving to the revised charging methodology, the Forum recommended that 2022/23 should be a transitional year, in which the lump sum was reduced by 50%, with the associated increases in per pupil rates. De-delegation charges 2022/23 were therefore set as follows:

Phase	Lump Sum	Per Pupil Rate
Primary	£225.00	£4.22
Secondary	£225.00	£5.87

Following the transitional year in 2022/23, the charging methodology should move to a purely Number on Roll (NOR) based calculation in 2023/24 and initial modelling indicates that the following de-delegation charges will be applied from April 2023:

Phase	Lump Sum	Per Pupil Rate
Primary	-	£5.34
Secondary	-	£6.13

2. Heritage Learning Team - Primary Schools Only

The Schools Forum have historically supported the work the Heritage Learning Team undertakes for primary schools to help meet the national curriculum and to support wider cultural learning and learning outside the classroom.

It is again proposed to consult on the continued de-delegation of this service for 2023/24, at the same level as currently de-delegated of £1.97 per pupil, in the primary sector only

3. Support for Schools in Financial Difficulty (SIFD)

It is again proposed to consult on the de-delegation of Support for Schools in Financial Difficulty (SIFD) 2023/24.

As with the 'staff costs' de-delegation, this service charging methodology originally included a lump sum element and the Forum recommended that this should move to a purely NOR basis, but with 2022/23 being a transitional year, to reduce the turbulence caused

For 2022/23, the de-delegation lump sum was reduced by 50%, with the per pupil rate increased accordingly. The de-delegation charges 2022/23 were therefore set as follows:

Phase	Lump Sum	Per Pupil Rate
Primary	£500.00	£8.39

Secondary	£500.00	£12.64
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Following the transitional year in 2022/23, the charging methodology should move to a purely Number on Roll (NOR) based calculation in 2023/24 and initial modelling indicates that the following de-delegation charges will be applied from April 2023:

Phase	Lump Sum	Per Pupil Rate
Primary	-	£10.87
Secondary	-	£13.22

An impact assessment has been undertaken based on the implementation of the purely NOR based methodology for this, and the 'Staff Costs' de-delegation and examples based around differing school sizes in both the primary and secondary phases are provided below:

Primary	Staff Costs Public Duties and Suspensions	Support for Schools in Financial Difficulty	Total
Number of Pupils	No Lump Sum	No Lump Sum	No Lump Sum
50	£169	£376	£545
100	£113	£252	£365
210	-£9	-£21	-£31
315	-£127	-£282	-£408
420	-£245	-£545	-£790
630	-£473	-£1,051	-£1,524

Secondary	Staff Costs Public Duties and Suspensions	Support for Schools in Financial Difficulty	Total
Number of Pupils	No Lump Sum	No Lump Sum	No Lump Sum
500	£92	£205	£297
700	£37	£83	£120
900	-£11	-£25	-£37
1100	-£63	-£140	-£202
1300	-£116	-£259	-£375
1500	-£176	-£391	-£567

4. Inclusion Hubs – Primary Schools Only

The LA is also proposing to continue with de-delegation proposals for Primary Inclusion Hubs for 2023/24.

Early this term, District Inclusion Hub leads met with officers, in order to refine the Inclusion Hub offer, align objectives more closely with the Alternative Provision Strategy and provide a more consistent approach across the county. Officers present including the Head of Inclusion and Head of Schools Finance and a recently appoint consultant working on Alternative Provision.

Since the meeting, further discussions have taken place with the Principal Educational Psychologist, and there is a shared view that it would be helpful to work more collaboratively across respective professional disciplines and there is an interested in the development of relational approaches to improve outcomes for all children and young people and with a particular focus on those who are vulnerable to and at risk of exclusion. An opportunity is being explored to develop policy and practice, which can then be shared across schools in Lancashire.

In addition, the possibility of a more uniform approach to the evaluation of the work of the Inclusion Hubs, is being considered, to find ways of measuring inclusion (rather than just exclusions) and trying to create a uniform measure across Districts that are making different offers. The LA is supporting this work.

A further Cross-District Inclusion Hub Leads and professionals meeting was scheduled to take place on Wednesday 15th June at 1.30pm to about 3.15pm, via Zoom and forum members were invited to attend.

The proposed de-delegation rate in 2023/24 remains at £11 per pupil.

5. School Improvement Functions

The DfE issued a consultation in 2021 around 'Reforming how local authorities' school improvement functions are funded'. The consultation sought views on DfE proposals to

- Remove the School Improvement Monitoring & Brokering Grant, which was currently allocated to local authorities to support school improvement activities;
- Make provisions within the School and Early Years Finance (England) Regulations for the financial year (FY) 2022-23 to allow local authorities to fund all of their school improvement activity (including all core school improvement activities) via de-delegation from schools' budget shares.

A Forum response to the consultation was submitted raising a number of concerns about the proposals.

The Lancashire grant allocation for 2021/22 equated to just under £2m and DfE proposals indicate that this would be reduced by 50% in 2022/23, potentially leaving a £1m shortfall in school improvement funding from April 2022.

The Grant will cease totally from 2023/24.

On 11 January 2022, DfE issued response to consultation, indicating that they intended to proceed with their proposals.

The LA did not bring forward any de-delegation proposals for 2022/23 but is now considering the possibility of consulting on a new school improvement activity de-delegation from April 2023.

If the LA decides to proceed with a de-delegation proposal information will be included in the annual consultation with schools to be issued in September 2022 and details of the proposals and the school responses will be reported to the working group and Forum in September and October 2022.

The working group considered the 2023/24 proposals and discussed key issues. Members reiterated some concerns about inconsistency in the inclusion hub offer and the need for the sharing of best practice and the development of key performance indicators to be available to measure the outcomes of hubs across different districts. The involvement of academies in the exclusion process and their ability to join their local hub, at an equivalent rate of £11 per hour was also discussed. Officers indicated that work was being undertaken to support inclusion hub developments along the lines suggested and that the Forum comments would be fed back into the process.

The Working Group:

- a) **Noted the report;**
- b) **Requested that their Inclusion Hub comments be considered by officers/Inclusion Hub Steering Groups:**
- c) **Supported the proposed consultations on other possible de-delegation proposals for 2023/24.**

5. Completing the reforms to the National Funding Formula: Government consultation response

In July 2021, the DfE issued a consultation titled Fair school funding for all: completing our reforms to the National Funding Formula. The Forum responded to the consultation.

On 28 March 2022, the DfE published its response to the consultation. The Government say that all the views received have influenced their final decisions and in summary, the DfE will now:

- bring forward legislation to move to allocate funding directly through a single national funding formula;
- require local authorities to move their factor values a minimum of 10% closer to the NFF in 2023 to 2024 as part of a 'smooth' transition to a direct NFF;
- continue the separate funding cycles for maintained schools and academies;
- introduce new transparency requirements for MAT pooling;
- review services funding through the ongoing responsibilities element of the central school services block (CSSB) while continuing with a legacy grant for unavoidable historic commitment costs.

No firm date is provided for the full implementation of the hard NFF, and as Lancashire has already adopted the NFF as the local funding formula, the 2023/24 requirements for LAs to

move factor values closer to the NFF will not have any significant impact on school funding requirements in the county from April 2023.

The DfE indicate that the approach to the transition in subsequent years will depend on the impact in the first transitional year in 2023/24.

The Working Group:

a) Noted the report.

6. Schools Bill 2022

Following the State Opening of Parliament on 10 May 2022, the Secretary of State for Education published a New Schools Bill. The Bill is wide ranging and incorporated some elements of the recent 'Opportunity for all' schools white paper.

Of relevance to the Schools Forum, the Bill includes proposals to move to a direct National Funding Formula.

Alongside the Bill, the Government have published a number of factsheets, providing further information about their proposals.

The National Funding Formula Reforms Schools Bill Factsheet was provided for members. This confirms that if the Bill is enacted, a duty will be placed on the Secretary of State to determine funding for all mainstream schools (both academies and maintained schools) in England through a single, directly applied national funding formula.

The document does indicate that the proposals allow for LAs to continue to allocate some aspects of schools' funding where the government judges that is necessary because LAs have the most detailed knowledge about the needs of their local schools. DfE indicate that they expect this supplementary funding to be limited to use where the LA has a Private Finance Initiative (PFI) contract for that school, or where the LA asks a school to provide additional school places to meet its sufficiency duty.

The measure will also provide for the Secretary of State to continue to fund LAs for other education provision, alongside the funding LAs receive for mainstream schools through the direct NFF, and the supplementary funding they receive to distribute to maintained schools and academies. This is funding for high needs, central school services and early years.

Elsewhere in the document the current 'block transfer arrangements are mentioned, with the legislation proposing a new mechanism, in place of the current block transfers, that will allow for the Secretary of State to reallocate funding from schools' national funding allocations to LAs' high needs budgets, on application of the LA. DfE will be consulting on the implementation of this mechanism in the second stage direct NFF consultation.

DfE also confirm that additional funding streams that schools may receive, such as the Pupil Premium or PE and Sport Premium, are distributed separately to the schools NFF and are therefore not in scope for this measure.

As set out in other DfE communications, it is proposed 'to take a measured approach to transition', and at this stage an “end date” for full implementation has not been set.

The Working Group:

- a) Noted the report.**

7. Implementing The Direct National Funding Formula Consultation

On 7 June 2022, the DfE launched a further consultation on 'Implementing the Direct National Funding Formula'. A copy of the DfE consultation document is available [here](#).

The consultation focuses on the detail of the implementation of the direct NFF, including:

- The interaction between the direct NFF and funding for high needs
- Growth and Falling Rolls funding
- Premises funding
- The minimum funding guarantee (MFG) under the direct NFF
- The annual funding cycle

Responses to the consultation must be submitted by 9 September 2022.

An briefing on the consultation was provided for the working group and an initial view for a draft response and it is intended that a draft Schools Forum response will be provided for the Forum meeting on 5 July 2022.

Members considered the information provided and were supportive of the initial views expressed.

The Working Group:

- a) Noted the report;**
- b) Were supportive of the initial views expressed on a possible Schools Forum consultation response.**

Subsequent to the meeting, a full Schools Forum consultation response was developed, and this is attached at Appendix D, for comment/approval by the Forum.

8. Scheme for Financing Schools in Lancashire

The School Standards and Framework Act 1998 requires local authorities to publish a scheme for financing schools, which details the financial relationship with the maintained schools in the council. Any amendments to schemes must be the subject of consultation with all schools and be approved by the Schools Forum.

In March 2022, the DfE issued a 14th update to Statutory Guidance on schemes, which amended the guidance for the 2022 to 2023 financial year. In addition to some minor edits to wording and the revision of dates, the main change highlighted by the DfE is that in the 'Borrowing by schools' section the reference to the Salix Scheme has been removed, as this scheme has now closed.

The guidance also confirmed that there is no extension to the school or LA submission deadlines for submitting Schools Financial Value Standard (SFVS) returns, with the school deadline for 2021/22 SFVS returns being 31 March 2022, and the LA Assurance Statement deadline being 31 May 2022.

The Authority has reviewed the Lancashire scheme and introduced the relevant amendments.

A revised draft Lancashire Scheme, incorporating the proposed DfE amendments can be viewed [here](#), with edits from the existing scheme shown as tracked changes.

On 20 April 2022, the county council issued a consultation with maintained schools, seeking views on the proposed scheme changes and provided an eform to facilitate responses.

32 responses were received in the consultation and an analysis is provided below:

Do you support the changes to the Lancashire scheme for financing schools that are being introduced as a result of the updated DfE scheme guidance?		
Yes	27	84%
No	0	0%
Not Sure	5	16%
Total	32	100%

No additional comments were received as part of the consultation process.

The working considered the proposed scheme amendments and the consultation analysis.

The Working Group:

- a) **Noted the report.**
- b) **Recommended that the Schools Forum approve the proposed scheme changes.**

This is a formal Schools Forum decision and members will be asked to formally approve the revised Lancashire scheme at the 5 July meeting.

9. Schools Supplementary Grant 2022 to 2023

Previous reports to the working groups and to Schools Forum provided information on the Schools Supplementary Grant. This grant was introduced by DfE for 2022/23, to distribute £1.6b of additional funding for schools and high needs, above the previous DSG settlement. The additional funding is being provided to support Health and Social Care Levy costs (increased NI contribution in 2022/23 for social care) and wider cost pressures.

Allocations for the Mainstream Schools Supplementary Grant are determined by the DfE, and the working groups and Forum have been involved in establishing the local arrangements for distributing the High Needs Supplementary Grant in Lancashire.

Subsequent to the March 2022 Forum meeting, the DfE have confirmed that local authorities and academies will receive their payments for 2022/23 in two tranches.

Payments will be made in May/June 2022 to cover April 2022 to August 2022, and in October/November 2022 to cover September 2022 to March 2023.

The Forum have agreed that the High Needs Supplementary payments will be made on the same basis as for mainstream schools, so these payments will be actioned in two tranches, as set out above.

Payments for the first tranche of allocations had now been processed and would be on June oracle information. It was noted that for the final calculation of the high Needs supplementary payments using the May 21 data, the overall rate for the WPN payments has reduced to £625.97 from the initial £630.69 as first forecasted.

The Working Group:

a) Noted the report.

10. Growth Fund Policy Update

The county council has a responsibility under section 14 of the education act 1996 to ensure that there are sufficient primary and secondary school places in the county.

Since 2014, the Schools Forum has had in place a Growth Fund Policy to assist schools/academies commission by the LA for basic need growth. The policy ensures that a transparent and formulaic process is used for allocating additional funds that takes account of expanding schools' needs whilst minimising the effect on the Dedicated Schools Grant (DSG).

The policy has been amended from time to time since its introduction, to take account of various developments. The latest substantive amendment of the policy was agreed by the Forum in March 2021, in order to support the establishment and growth of a new school in Lancashire.

As part of the ongoing discussions with schools in the county over basic need places, the School Place Planning Team have raised a concern that may require an addition to the Growth Fund Policy.

For schools that are expanding, the policy operates by providing additional funding for a school commissioned by the LA to increase its admission number. A school's allocation is calculated in the first year on the difference between the previous admission number and the new admission number and in subsequent years on the difference between the previous admission number and the actual numbers of Year R (Primary) or Year 7 (Secondary) pupils on roll as at the previous January (provided that more pupils are on roll than the previous admission number).

An issue has arisen where a school has agreed to exceed its Published Admissions Number (PAN) in order to meet the need for additional places in the area. Under the policy this will attract an appropriate Growth Fund allocation from the school.

However, the school have also officially informed the LA that that they have decided in following year to subsequently drop their PAN, despite objections from the LA and knowing that there remains a need for future additional places in the area. In connection with Growth

Fund allocations, this may lead to a situation where the fund may be asked to pay out an increased level of funding for schools that lower their PAN and then request further funding to exceed their revised admissions number and receive funding calculated from a lower base.

In addition, by agreeing to exceed their PAN, rather than officially increasing the PAN through the admission round, a school may initially agree to admit the additional pupils in the first admissions tranche but then push back on subsequent pupils being allocated as pupils withdraw from places (possibly as a result of appeals elsewhere etc). There is also the possibility that a school no longer has a duty to maintain the exceeded PAN figure in future years, once the cohort becomes Y1 or Y8 and beyond.

Clearly, admissions arrangements and the legal admissions authority vary dependent on the category of school or academy involved, but governing bodies of all types of school will have views on the appropriate arrangements for their school.

However, there is some concern that the current Growth Fund Policy may benefit from certain clarifications around the issues highlighted above, so that there is clarity on the funding calculation and expectations on schools that are in receipt of growth funding. It is therefore proposed to add the following conditions to the Growth Fund policy, subject to the views of the Forum:

- Where expansion funding has been provided to a school based on a specific Published Admissions Number (PAN), then within the following 7 years for primary schools/academies or 5 years for secondary schools/academies, considerations of extra funding will be considered on the same PAN irrelevant of any decision by the school/academy to reduce their PAN;
- Where a school has reduced their PAN, this may only be considered as the new growth funding baseline after 7 years for primary schools/academies or 5 years for secondary schools/academies post reduction;
- By the school/academy signing the funding agreement they are committing to taking up to that number of pupils across the whole academic year and maintaining that higher admission number for that cohort as it moves through the school.

The Working Group:

- a) Note the report;**
- b) Supported the proposed update to the Growth Fund Policy.**

11. Split Site Funding Appeal

Following a series of reports, a revised split site policy was agreed by the Forum in January 2019 and subsequent reports have presented appeals and late applications for the consideration of members.

From 2021/22, transitional arrangements should have finished, and schools should have received a split site allocation in accordance with the revised criteria. However, due to an oversight, transitional protection for split site allocations remained in the formula for 2021/22.

This issue was identified as part of the budget preparations for 2022/23 and school budgets were issued with split site allocations calculated purely on the revised criteria.

On receipt of their 2022/23 budget, it then became apparent to one school that the split site funding had been lost and the school have submitted an appeal against this.

It was noted that there is no intention to clawback the split site allocation issued for 2021/22 regardless of the outcome of this appeal.

The details of the appeal information submitted by the school are provided below:

The school consists of three buildings; Nursery, Key Stage 1 and Key Stage 2. A steep hill separates Key Stage 1 and the Nursery from Key Stage 2.

The Nursery and Key Stage 1 classes use the Hall in the key Stage 2 building for assemblies, lunch and PE. They use the hall on a daily basis as there is no other provision for them 'up the hill'.

In support of the appeal the school has also provided some photographs, a site plan and a video of the Headteacher walking from the Key Stage 2 building to the Key Stage 1 building. Please see Appendix B.

The school indicate that the distance between the buildings is circa 80m.

Accompanying photographs and a video provided by the school were shared with the working group.

Members consider the information provided and agreed with the LA assessment that the school does not meet the current split site criteria, as all the buildings are on a single site with no physical barrier or public right of way between them, and the distance is below 300m.

The Working Group:

- a) Noted the report and the information provided;**
- b) Rejected the split site appeal.**

LANCASHIRE SCHOOLS FORUM

Name of Group: High Needs / Early Years / Schools Block Working Group

Date of Meeting: June 2022

Item No: 4

Title of Item: 2021/22 Schools Budget Outturn Report

Annex A refers

Executive Summary

This report provides the Working Groups with details of the 2021/22 Schools Budget final financial outturn position, in relation to each funding block.

Recommendations

The Working Group is asked to:

- a) Note the report and the 2021/22 Schools Budget final financial outturn position.**
- b) Express any views in relation to each funding block outturn position for 2021/22.**

Background

This report provides information on the Schools Budget outturn position for 2021/22

The Overall Schools Budget outturn position for 2021/22 shows an underspend of circa £8.4m.

Further details are provided below in connection with each funding block.

Schools Block/ Central Schools Services Block (CSSB)

Schools Block/CSSB 2020/21			
	Budget (£)	Actual (£)	Variance (£)
Schools Block			
Maintained Schools	667,763,728	664,774,644	2,989,085
Academy Recoupment	182,180,023	184,559,171	-2,379,148
CSSB			
ESG Retained Duties (transferred to DSG)	2,591,000	2,591,000	0
Overheads	397,000	397,000	0
Copyright Licence	999,814	997,550	2,264
School Forum	188,000	188,000	0
Pupil Access (Admissions)	1,400,000	1,400,000	0
Rates Rebates	-75,000	125,267	-200,267
Early Intervention	350,000	301,033	48,967
PFI - Sixth Form	915,000	1,022,548	-107,548
Total Expenditure	856,709,565	856,356,213	353,353
Total Grant	-856,709,565	-856,709,565	0
Total Variance	0	-353,352	353,353

The outturn position for the 2021/22 Schools Block/CSSB revealed a circa £0.4m underspend. Further information on key variances is provided below:

Schools Block

Maintained Schools/Academy Recoupment

The total Schools Block expenditure on maintained schools for 2021/22 underspent by circa £3.0m which is mainly due to academy recoupment increasing by circa £2.4m during the year, as schools converted to academies.

The remaining variance of circa £0.6m, the difference between the 2 figures, is mainly due to an underspend on the growth fund.

It should be noted that the budget and actual figures incorporate the agreed £2m transfer from the Schools Block to the Early Years Block.

Central Schools Services Block (CSSB)

Rates Rebates

The rates rebate budget estimated a £75k level of income from rateable value challenges throughout the year, but there was actually net expenditure of around £125k against this budget line, giving a total variance of just over £200k. Expenditure relates to a contribution to the LCC Estates team to facilitate the school rateable value challenges and the payment of rates rebates to schools in accordance with the Forum policy.

Members will recall that the outturn position on the rates rebates budget for 2020/21 was a circa £86k overspend, but the budget generated a circa £500k surplus in 2019/20. As we are at the end of the current ratings cycle, there are reduced opportunities for rateable value appeals, but over the lifetime of the current schools forum policy, the arrangements have generated significantly more income than has been paid out.

Early Intervention

The Early Intervention budget has underspent by circa £50k at year end, largely due to reduced staffing expenditure on the MASH budget.

PFI - Sixth Form

This budget line ended the year over £100k overspent. This was due to ongoing expenditure on the former Thomas Whitham Sixth Form and Hameldon PFI sites, mainly attributable to utilities costs, that must continue whilst the sites are converted to use by other schools.

Other CSSB budget lines ended the year on or near the agreed budget level.

Total Variance

The total Schools Block and CSSB year end variance, incorporating the explanations above, is an in year underspend of circa £0.4m.

High Needs Block

High Needs Block			
	Budget (£)	Actual (£)	Variance (£)
Maintained Schools			
Mainstream Schools	11,623,579	15,523,671	-3,900,093
Special Schools	64,867,889	68,423,320	-3,555,431
Alternative Provision	10,092,249	11,198,362	-1,106,113
Further Education - Post 16	7,000,000	8,297,121	-1,297,121
Commissioned Services	31,305,000	33,441,211	-2,136,211
Exclusions	-1,000,000	-805,485	-194,515
High Needs Growth	18,405,689	0	18,405,689
Total Grant	-142,294,406	-142,625,572	331,166
TOTAL VARIANCE	-1	-6,547,372	6,547,371

The outturn position for the 2021/22 High Needs Block (HNB) revealed a circa £6.5m underspend. Further information is provided below:

Maintained Schools

Actual costs on all elements of maintained schools HNB expenditure, including mainstream schools, special schools and PRUs were above the budgeted figure. The most significant variance related to mainstream schools and represented a circa 33% growth in funding compared to the budget. Special Schools grew by over 5% and Alternative Provision by 11%.

Further Education - Post 16

The Further Education - Post 16 budget had a growth of £1.3m or circa 19%.

Commissioned Services

The commissioned services expenditure ended the year with an overspend of over £2.1m. As per established practice, a more detailed breakdown of the HNB expenditure against the agreed budget lines is provided at Annex A. Of particular interest to the Forum on the commissioned services breakdown will be the £3.2m overspend on the Out-county budget. This overspend figure is reduced from 2020/21. As members will be aware, strategies are being deployed to enhance maintained provision within the county, through the AP Strategy, SEN Units and increased special school capacity, but this will take time to feed through into the budget position.

Exclusions

The original 2021/22 budget estimated that £1m income would be generated for High Needs Block establishments as funding followed pupils who were excluded from mainstream schools during the year. The actual income was circa £0.8m, created a variance of just under £0.2m

High Needs Growth

When the 2021/22 Schools Budget was being set, provision was made for HNB growth, which was forecast at circa £18m for the year. This provision was utilised in year to offset the increased expenditure of circa £12m across HNB school budget lines and within commissioned services, allowing the overall HNB budget to end the year with a circa £6.5m surplus.

It should be noted that the level of in year HNB growth has been running at very roughly £10m+ (circa 10% of HNB budget) for a number of years and the budget has only managed to generate a surplus in 2021/22 thanks to significant increases in the level of DSG HNB allocation. The levels of DSG increases are expected to reduce in future years (early indications are 5% in 2023/24, then 3% subsequently), which are likely to again place considerable pressure on high needs funding and reserves.

DSG grant

The DSG grant for the HNB in 2021/22, was circa £0.3m over budget, due to DfE adjustments relating to recouPMENT for post-16 and free school places.

Early Years Block (EYB)

Early Years Block			
	Budget (£)	Actual (£)	Variance (£)
Maintained Schools			
2YO	1,642,727	1,833,775	-191,047
3_4 YO	18,936,080	18,055,841	880,240
PVI			
2YO	8,086,283	8,188,328	-102,045
3_4 YO	54,241,198	50,049,127	4,192,071
Early Years DAF	313,650	142,680	170,970
Early Years PPG	751,121	813,516	-62,395
Commissioned Services			
SEND Inclusion Fund	500,000	444,173	55,827
Total Grant	-82,471,546	-79,020,013	-3,451,533
TOTAL VARIANCE	1,999,513	507,426	1,492,087

The Early Years Block outturn position for 2020/21 indicates a circa £1.5m underspend which means there would have been an overspend without the circa £2m transfer from Schools Block.

Further information is provided below:

Maintained Sector

Early Years Block expenditure relating to maintained providers overspent on 2 year olds but underspent on 3&4 year old provision.

PVI Providers

The PVI outturn position also revealed a similar pattern, with an overspend on 2 year old provision and a significant underspend on 3&4 year old provision of circa £4.2m.

Disability Access Fund

This budget line was circa £170k below budget.

Early Years Pupil Premium

This budget line overspent by circa £60k in 2021/22.

Commissioned Services

Commissioned Services in the Early Years Block relates to the Inclusion Fund and expenditure was circa £55k below budget.

Previous years underspends on this budget have prompted the Early Years Working Group to agree significant changes to the inclusion fund process, with increased funding rates, expanded eligibility and a streamlined application process introduced from September 2021.

It is estimated that the full year effect of the changes introduced part way through 2021/22 would mean that inclusion fund expenditure will in future be up to the agreed budget level, or perhaps beyond it.

DSG Grant

Grant payment calculations for the early years block were temporarily amended by the DfE for 2021/22 so that the payments were based on actual take up each term. The actual grant income for the year was some £3.5m below the original budget, as early years take up was below the level forecast in the original 2021/22 budget. It should be noted that adjustments could still be applied in relation to the spring term 2022 which are scheduled by the DfE to be actioned in July 2022.

Total Variance

The total variance for the early years block shows an underspend of circa £1.5m underspend but would have been overspend without the circa £2m transfer from Schools Block.

This underspend could be used to assist with any early years DSG adjustment required in July 2022 and towards the additional £1m contribution agreed in the 2022/23 early years budget.

2021/22 High Needs Funding Block Monitoring at Year End 2021-22

Annex A

	BUDGET			Actual	
	Approved Budget	Budget Movement	Current Budget	Actual	Full Year Variance Under(-) Over (+)
Expenditure	£	£	£	£	£
<u>Mainstream Schools</u>					
Core Uplift Funding	1,160,271	0	1,160,271	1,428,560	268,289
Additional Support Uplift Funding	111,982	0	111,982	227,336	115,354
Top-up Funding	10,224,528	0	10,224,528	13,047,553	2,823,025
SERF Place Funding	126,798	0	126,798	297,107	170,309
Additional HNB Funding	0	0	0	523,115	523,115
	11,623,579	0	11,623,579	15,523,671	3,900,093
<u>Special Schools</u>					
Place Funding	28,705,000	0	28,705,000	28,705,000	0
Additional Place Funding	1,343,333	0	1,343,333	2,316,667	973,333
Top-up Funding	19,418,815	0	19,418,815	21,014,318	1,595,502
School Specific Funding	15,400,741	0	15,400,741	15,619,787	219,047
Additional HNB Funding	0	0	0	767,548	767,548
	64,867,889	0	64,867,889	68,423,320	3,555,431
<u>Alternative Provision</u>					
Place Funding	6,782,500	0	6,782,500	6,782,500	0
Additional Place Funding	0	0	0	31,667	31,667
Top-up Funding	3,309,749	0	3,309,749	4,065,266	755,518
Additional HNB Funding	0	0	0	318,929	318,929
	10,092,249	0	10,092,249	11,198,362	1,106,113
<u>Further Education - Post 16</u>					
Additional Place Funding	0	0	0	0	0
Top-up Funding	2,820,249	0	2,820,249	3,667,329	847,080
Independent Specialist Providers	4,111,112	0	4,111,112	4,629,792	518,680
	6,931,361	0	6,931,361	8,297,121	1,365,760

	BUDGET			Actual	
	Approved Budget	Budget Movement	Current Budget	Actual	Full Year Variance Under(-) Over (+)
Expenditure	£	£	£	£	£
<u>Commissioned Services</u>					
PFI - Special, Nursery	1,194,000	0	1,194,000	1,104,766	-89,234
Commissioned Alternative Provision services	1,000,000	0	1,000,000	769,258	-230,742
Hospital Provision	927,000	0	927,000	780,599	-146,401
Independent Hospital Provision	0	0	0	-20,491	-20,491
Education in Residential Homes	0	0	0	0	0
Out County - Specialist provision places	19,500,000	0	19,500,000	22,734,077	3,234,077
Out County - Mainstream / academies places	2,000,000	0	2,000,000	2,011,040	11,040
Inclusion Service Specialised Equipment	447,000	0	447,000	753,298	306,298
Inclusion Service Inclusion Projects	747,000	-600,000	147,000	25,837	-121,163
Inclusion Service Teachers & Support	3,464,000	0	3,464,000	3,282,848	-181,152
Multi Agency Development	75,000	0	75,000	75,000	0
Support for Vulnerable Pupils - SI	899,000	0	899,000	872,883	-26,117
Overheads	1,052,000	0	1,052,000	1,052,000	0
Budget Savings	0	600,000	600,000	0	-600,000
				96	
	31,305,000	0	31,305,000	33,441,211	2,136,115
<u>Other</u>					
High Needs Growth	18,405,689		18,405,689	0	-18,405,689
Exclusions	-1,000,000		-1,000,000	-805,485	194,515
	17,405,689	0	17,405,689	-805,485	-18,211,174
Total Expenditure	142,225,767	0	142,225,767	136,078,200	-6,147,662
Income					
<u>DSG</u>					
Provisional High Needs Block Funding as at 19.12.2020	151,032,906		151,032,906	151,158,906	126,000
DfE High Needs Place Adjustments	-336,500		-336,500	0	336,500
DfE High Needs deduction for direct funding of places	-8,402,000		-8,402,000	-8,533,334	-131,334
	142,294,406	0	142,294,406	142,625,572	331,166
Total Income	142,294,406	0	142,294,406	142,625,572	331,166
Net Surplus	-68,639	0	-68,639	-6,547,372	-6,478,828

LANCASHIRE SCHOOLS FORUM

Name of Group: High Needs / Early Years / Schools Block Working Groups

Date of Meeting: June 2022

Item No: 5

Title of Item: School Balances and Clawback 2021/22

Annex A refers

Executive Summary

This report provides information on the 2021/22 outturn position for delegated school balances and seeks views on relevant matters, including clawback of school balances.

Recommendations

The Working Group is asked to:

- a) Note the report;**
- b) Note the overall position on school balances at 31 March 2022, including the individual school level information provided in the report;**
- c) Express any views about the school balances and clawback arrangements to be applied at 31 March 2023;**
- d) Express any views about the individual school request for a clawback exemption at March 2023;**
- e) Note the underspend on the supply scheme budget at 31 March 2022 and express any views about the scheme reserve;**
- f) Express any other views in connection with the School Balances and Clawback 2021/22 report.**

Background

School Balances Outturn 2021/22

This report sets out the year end position of schools' delegated budgets at 31 March 2022.

The final outturn position against schools delegated budgets at 31 March 2022 is an underspend of £5.173m. This means that school balances have increased by £5.173m in 2021/22, to a total of £95.325m.

The tables below show analysis of school balances by phase at the end of the financial year 2021/22.

2021/22 School Balances - In-Year Movement of Balances by Phase

Phase	Balance Brought Forward as at 1 April 2021	In-year Increase / (Decrease) 21/22	Balance Carried Forward as at 31 March 22
	£m	£m	£m
Nursery	0.745	0.053	0.798
Primary	58.429	-(2.677)	55.752
Secondary	23.603	5.893	29.496
Special	5.669	1.871	7.541
Short Stay	1.705	0.022	1.727
Total	90.151	5.173	95.313

As can be seen, all phases showed an overall increase in their aggregate balance, with the exception of the primary school phase, where aggregate balances fell by circa £2.7m.

Increased levels of core funding were provided by the Government in 2021/22, with Lancashire's gross Dedicated Schools Grant (DSG) allocation some £86m higher than that received in 2020/21. This was partly due to increased funding nationally made available by Government, and the incorporation of funding for the teachers pay and pensions grants into core school funding that were previously paid as separate grants. There was also an increase in the overall numbers of pupils in Lancashire compared to 2020/21, which contributed to the increased level of funding received.

In addition to the core Dedicated Schools Grant (DSG) funding allocations to schools, considerable additional funding was allocated during 2021/22 in the form of Government grants. For Lancashire maintained schools, grant allocations in the year totalled over £36m.

A number of these grants were specifically to assist schools continue to respond to the challenges of supporting pupils catch up on learning. Some of these grants were allocated by the DfE on an academic year basis and will need to be spent by the end of the current school year, which may have had some impact on the level of balances held at 31 March 2022.

It should be noted that the aggregate school balances figure at 31 March 2022 includes a number of adjustments related to school academisations during the year. This included academisation of 5 primary schools and a secondary school.

2021/22 School Balances –In-Year Movement Count of Schools by Phase

Phase	Count of deficit in year	Count of surplus in year
Nursery	12	12
Primary	268	193
Secondary	9	37
Special	5	24
Short Stay	4	4
Total	298	270

298 schools operated an in year deficit in 2021/22, which equates to 52%, with 270 schools (48%) operating an in year surplus. This level of in year spending in 2021/22 is more in line with historic levels. In 2020/21, 88% of schools operated an in year surplus, as school expenditure levels were curtailed, largely as a result of reduced operations during national COVID-19 lockdowns.

2021/22 School Balances – Number of Schools in Surplus/Deficit by Phase

Phase	Count of deficit close balance	Count of surplus close balance
Nursery	6	18
Primary	11	450
Secondary	1	45
Special	3	26
Short Stay	0	8
Total	21	547

A total of 21 schools ended the 2021/22 financial year in deficit. The number of schools in deficit at 31 March 2022 has decreased from 30 schools in deficit a year earlier.

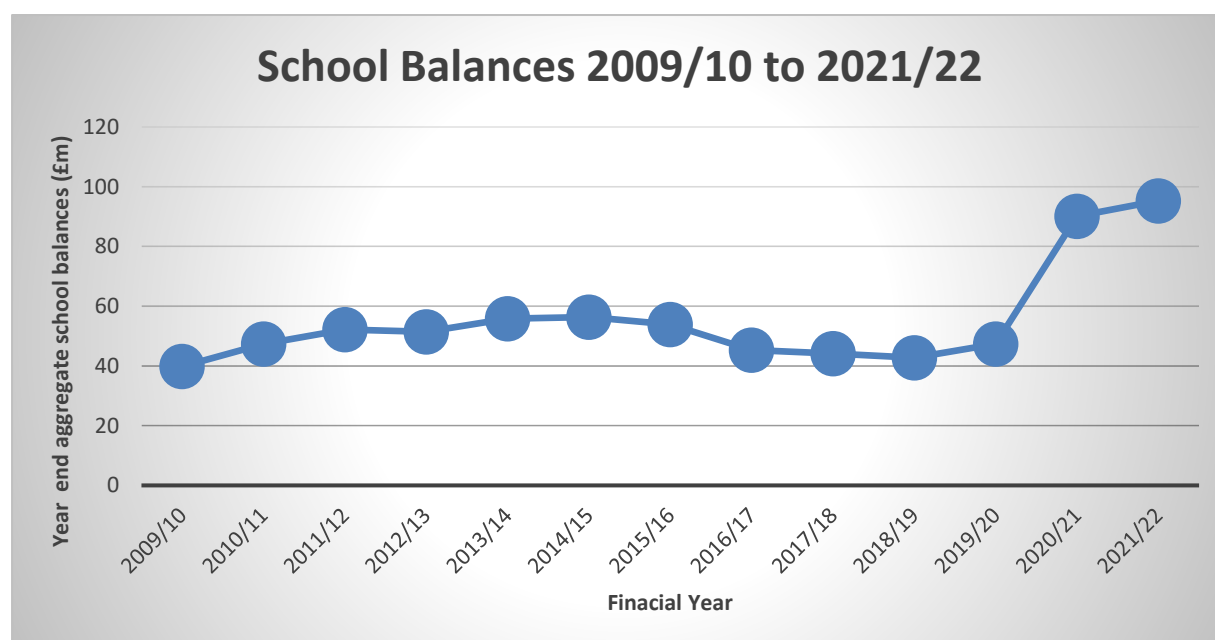
The nursery sector remains the most concerning phase highlighted through this table, with 6 out of 24 schools ending the financial year in deficit, representing 25% of schools in the sector.

A comparison showing the total number of schools in deficit across recent years is provided below:

Year End	Number of schools in deficit
31 March 2022	21
31 March 2021	30
31 March 2020	41
31 March 2019	39
31 March 2018	47
31 March 2017	40
31 March 2016	25
31 March 2015	18

The number of schools in deficit at year end is at its lowest level since March 2015. However, the 2022 figure may be artificially low, as some schools may have high levels of grant funding in their year end balances, due to unspent funding such as Covid related catch-up grants.

Aggregate School Balances by Year



The graph demonstrates the trend in aggregate school balances over a number of years and shows that following the significant rise in the balances held by schools at March 2021, school balances have increased further at March 2022, but at a much reduced rate. Balances at the end of 2021/22 are at £95.325m, however, as noted above, there may be covid related reasons contributing to this year end position. Analysis provided by schools about their year end position at 31 March 2022 indicates that circa £28m of total balances are classed as 'committed'.

To provide context for the total school balances figure, the current authority guideline for schools is to have reserves equating to 12% of total Combined Financial Reporting (CFR) income or a minimum of £60,000. This is to ensure that individual schools can withstand potential financial risks and stresses. If all Lancashire schools held the

guideline balance, the total balance would have been circa £106m at 31 March 2022, compared to the actual balances held of circa £95m.

Support for Schools in Deficit

The county council, in consultation with the Lancashire Schools Forum, has continued to provide significant targeted support and enhanced monitoring and early warning to support schools that are in, or may be heading towards, financial difficulty. This includes monitoring the financial outlook of schools on the Schools in Financial Difficulty (SIFD) category warning system for maintained schools, issuing early warning letters to offer a 'heads-up' that financial pressures may be mounting and using the agreed SIFD procedures to provide additional support to some schools.

21 schools ended the 2021/22 financial year in deficit, compared to 30 schools a year earlier, as a number of schools returned to surplus during the year through the delivery of budget recovery plans.

During the year, an amendment to the SIFD support criteria was introduced to allow interest charges and provision of school finance support will be met centrally from SIFD funding for schools with an agreed recovery plan, or an agreed sustainability plan.

A one-off SIFD allocation to a Lancashire school was also agreed, to assist with the financial recovery plan.

Individual School Balances 2021/22

Attached at **Annex A** are details about the movement in balances at an individual school level in 2021/22. As previously requested by the Forum, in addition to the year-end balance by school, information is included in this annex setting out:

- Balance as a % of CFR income.
- Balance per pupil.

Members will be aware that for March 2022, due to a number of uncertainties related to covid, the Forum supported the suspension of clawback on school balances. This annex has previously included a figure relating to the 'Year-end balance adjusted for approved exemptions' for each school. This column is not necessary this year, as no exemptions need be applied as the application of clawback was suspended.

School Balances and Clawback Policy 2022/23

Whilst clawback has been suspended on year end balances at March 2020, 2021 and 2022, the guideline balance policy remained unchanged, as follows:

- 12% of Consistent Financial Reporting (CFR) income for all phases of maintained school
- A £60,000 minimum balance threshold will be applied.

The Forum are now asked to consider the school balances and clawback policy to be applied at 31 March 2023.

When considering the policy to be applied at March 2022, it was agreed that the clawback of excess balances would be suspended in 2021/22 and no clawback would be applied to school balances at 31 March 2022. This clawback suspension was in recognition of the continued funding and expenditure uncertainties caused by COVID-19.

Furthermore, the Forum indicated that it was likely that clawback would be reintroduced on school balances above the guideline at 31 March 2023 but agreed that this policy would be reviewed in July 2022, in light of the 2021/22 outturn data, any ongoing COVID-19 issues or any other implications, before it was confirmed.

The 2021/22 outturn position has revealed an increase in school balances and schools are operating on a more normal basis as far as the pandemic is concerned. Some Covid related challenges for schools do however remain, both financial and operational.

In financial terms, school balances still contain significant funding for covid catch up grants that were allocated by the DfE on an academic year basis. As referred to above, the Analysis of Balances return from maintained schools about their year end position at 31 March 2022 indicates that circa £28m of total balances are classed as 'committed'. This was across over 400 schools.

Whilst the level of committed balances has reduced from 2020/21, when the figure was £36m, it is still well above pre-pandemic levels, with the 2019/20 figure equating to only £6.8m.

In addition, members will be aware that there are significant and increasing costs pressure facing schools, with UK inflation jumping to 9% in the 12 months to April 2022, the highest level for 40 years, and expected to rise further.

A number of schools balances and clawback options are available to the Forum for 2022/23, which include:

- a) Reintroduce a clawback policy in 2022/23, as per previous arrangements set out below, or with amended rates:
 - A clawback rate of 50% is to be applied to any balance above guideline in the first year a school exceeds the guideline (after adjusting for exemptions)
 - A clawback rate of 100% is to be applied to any balance in excess of guideline where the guideline has been breached for two or more consecutive years (after adjusting for exemptions)

(Note: As clawback was suspended in 2021/22, no school would be subject to the 100% clawback rate in 2022/23).

- b) Suspend the application of clawback at March 2023 due to the continued uncertainties around school funding , including the significant Covid catch up

funding in the system that operates on an academic year basis, and due to the substantial cost pressures facing schools over the coming months and years, with inflation at a 40 year high and rising;

- c) Other suggestions that members may have e.g., Raising the threshold percentage from the current 12%.

Clawback Exemption Request 2022/23

Members will recall that at the last meeting, a clawback exemption request was agreed by Forum in relation to the 31 March 2023 balances at a Lancashire primary school, regardless of the general clawback policy to be agreed for 2022/23.

A further request has now been received for Forum to consider an exemption from clawback for a Lancashire secondary school even if clawback is reintroduced generally.

The secondary school in question has limited sports facilities, which impacts on its ability to deliver a full curriculum offer in PE. Facilities available to the school mean that they cannot do any sports such as netball, basketball, handball, tennis, badminton, volleyball etc. This places a significant limit to the potential achievements of the students and the breadth of curriculum on offer.

Historically, the school did have an outside tennis/netball court, but this can no longer be used for H&S reasons.

The school have been considering options to resolve the issue since they lost the use of their court and, working with outside contractors, the school have identified this as the perfect site to build a new sports hall. Costings and plans from a company who can deliver the sports hall have been obtained and the school is about to apply for planning permission.

In preparation for the potential costs, the school have managed to save a significant amount of money for the project, with circa £0.5m of current reserves earmarked for to fund the new sports hall.

Using reserves and private funds, supplemented by additional fundraising, the school anticipate that they could potentially afford to go ahead with the project if they split the cost of the construction over two years.

With the timeframes for obtaining the relevant planning permissions and commencing the building works, the school are concerned that they may not have spent much of the funding earmarked for the sports hall by March 2023.

The school are therefore asking that they be exempt from clawback at March 2023 (if necessary), so that funding earmarked for the sports hall project is not lost to clawback and can be utilised in 2023/24 to enable them to fund the costs of the project.

The views of the working group are sought.

Schools Budget Reserves 2021/22

The table below shows the 31 March 2022 position on Schools Budget Reserves.

		£
<u>1</u>	<u>DSG Reserve</u>	
	Opening Balance	-16,095,920
	21/22 underspend	-8,392,811
	Closing Balance	-24,488,731
<u>2</u>	<u>Schools in Financial Difficulty Reserve</u>	
	Opening Balance	-2,009,335
	Forced academy closing balance	10,397
	Forced academy closing balance	-10,965
	Thomas Whitham USF transfer	-28,603
	Unclaimed income	-439,563
	Final YE reserves movement 21/22	-1,412,947
	Closing Balance	-3,891,016
<u>3</u>	<u>De-delegated Reserves</u>	
	Opening Balance	-767,038
	Year End reserves movement 2122	-151,289
	Closing Balance	-918,327
<u>4</u>	<u>Supply Teacher Reserve</u>	
	Opening Balance	-1,894,071
	Reserves Movement 2122	-365,741
	Closing Balance	-2,259,812
<u>5</u>	<u>Schools Balances</u>	
	Opening Balance	-90,151,339
	Revenue surplus in year	-16,006,257
	Forced academy closing balance	10,965
	Revenue deficits in year	10,832,934
	Closing Balance	-95,313,697
<u>6</u>	<u>Total All Reserves</u>	
	Open Balance	-110,917,703
	Net In Year Movement	-15,953,880
	Closing Balance	-126,871,583

Further information about the year end reserves are provided below:

1. DSG Reserve

The overall Schools Budget for 2021/22, excluding individual school balances, was an underspend of £8.393m. Details of this figure are provided in the Schools Budget

Outturn report 2021/22. This underspend has been added to the DSG Reserve as at 31 March 2022.

The outturn position for the DSG Reserve is therefore a balance of £24.489m.

This is the highest level of DSG Reserve held since the year ending March 2015.

2. Schools in Financial Difficulty Reserve

In order to maximise the funding available in the Schools in Financial Difficulty (SIFD) Reserve, a number of adjustments have been made to the reserve in 2021/22.

This includes unallocated schools income, which has been placed in the reserve at year end. This is money received and held in the county councils schools' income account, until it is identified and transferred to the appropriate school. Ongoing work continues to trace and allocate this income correctly, so the figures will reduce as income is identified and allocated.

As members will be aware, convertor academies take a surplus or deficit balance with them to their academy trust, whereas the balance at forced academies remains with the LA. Where balances have accrued due to academy conversions, these have been transferred to the SIFD reserve.

Including the above and underspends, the reserve has increased by £1.9m in year. The level of expenditure is expected to increase in 2022/23 as the educational recovery from the pandemic continues and due to significant inflation causing increased cost pressures.

These in year movements leave the final year end position on the reserve at circa £3.9m.

3. De-Delegation Reserve

The de-delegation reserve ended the year with a surplus of circa £0.9m.

There was a net underspend on de-delegations in 2021/22 of circa £0.15m.

Members will recall that for the Inclusion Hubs de-delegation the LA includes adjustments relating to inclusion hub funding that has been delegated to banker schools at the start of the year. So that individual school balances at certain banker schools were not artificially high, which would impact on school year end balances reporting and national benchmarking, this funding was held by the LA for year end accounting purposes and then redistributed to the relevant banker schools in the new financial year. These adjustments are included in the opening and closing balances of the de-delegation reserve and equate to circa £0.4m.

4. School Teaching and Support Staff Supply Reimbursement Scheme

The staff reimbursement scheme ended the year with an underspend of circa £0.4m, leaving an outturn position of circa £2.3m.

The overall in year position includes a surplus on the teacher scheme of just under £0.6m, which was offset by a circa £0.2m deficit on the support staff scheme.

This level of overall surplus is higher than may have been expected following the covid related staffing absences during the 2021/22 financial year, which was particularly concerning around the time that the omicron variant was taking hold. However, the unavailability of supply staff and the fact that absences were so great that some schools needed to close for short periods of time, meant that the demand on the supply budget was not as great as could have been the case.

The Forum has previously agreed that any year end balance above £1.25m should be redistributed to scheme members. The working group may wish to consider if £1.25m remains an appropriate maximum level for the reserve or if it should increase to say £1.5m. Whatever level is agreed, the Forum are asked to support the redistribution of the scheme reserve above that level back to scheme members.

Taking account of the deficit on the support staff element of the scheme, it is proposed that the 'excess' scheme reserve should be redistributed on the basis of the contribution levels to the teaching staff scheme only.

For 2023/24, members will need to consider a rise in the premiums charged for the support staff scheme, but it may be possible to hold the premiums on the teaching element of the scheme to 2022/23 levels. Further reports will be presented to the Forum in due course.

5. School Reserves

As set out earlier in the report, school balances increased to just over £95m at the end of 2021/22, when school closure/academisation adjustments are taken into account.

The total of all schools reserves is therefore £126.872m at 31 March 2022, an increase of nearly £16m.

Annex A

Sch no	DFE No	Sch name	Phase	Revenue open balance 1/04/21	Revenue in year movement 21/22	Revenue close balance 31/03/22	Revenue cfr income	NOR	Balance as % of CFR income	Balance per pupil
01162	1049	Appletree Nursery	Nursery	-£183,042	-£24,125	-£207,167	£318,593	53	-65%	-£3,909
06160	1021	Stoneygate Nursery	Nursery	£14,311	-£5,721	£8,590	£410,323	63	2%	£136
08160	1018	Moorgate Nursery	Nursery	-£32,624	-£6,756	-£39,380	£204,110	19	-19%	-£2,073
09160	1003	Highfield Nursery	Nursery	£53,452	£28,411	£81,863	£454,856	63	18%	£1,299
09161	1002	Duke Street Nursery	Nursery	£65,461	-£2,184	£63,278	£583,240	117	11%	£541
11160	1000	Lee Royd Nursery	Nursery	£30,904	-£6,469	£24,434	£434,657	77	6%	£317
11161	1024	Fairfield Nursery	Nursery	£31,762	-£33,139	-£1,376	£367,410	62	0%	-£22
11162	1027	Ribblesdale Nursery	Nursery	£22,946	£20,378	£43,323	£344,235	44	13%	£985
12166	1008	Ightenhill Nursery	Nursery	£93,458	£20,609	£114,067	£417,122	68	27%	£1,677
12168	1001	Rockwood Nursery	Nursery	£94,592	£31,675	£126,267	£565,357	87	22%	£1,451
12169	1007	Rosegrove Nursery	Nursery	£60,068	-£12,162	£47,907	£456,440	60	10%	£798
12171	1011	Stoneyholme Nursery	Nursery	£128,055	£7,271	£135,326	£420,174	67	32%	£2,020
12172	1035	Whitegate Nursery	Nursery	-£20,626	£26,995	£6,369	£531,039	99	1%	£64
12173	1047	Basnett Street Nursery	Nursery	£99,892	£8,568	£108,460	£590,767	76	18%	£1,427
12174	1048	Taywood Nursery	Nursery	-£178,881	-£6,138	-£185,019	£693,296	83	-27%	-£2,229
12175	1050	Reedley Hallows Nursery	Nursery	£129,604	-£30,100	£99,504	£742,585	144	13%	£691
13160	1015	Bradley Nursery	Nursery	£142,044	£35,335	£177,380	£910,396	164	19%	£1,082
13161	1016	Walton Lane Nursery	Nursery	£94,259	-£115,201	-£20,942	£816,700	60	-3%	-£349
13162	1026	Woodfield Nursery	Nursery	£89,500	-£22,856	£66,644	£431,075	79	15%	£844
13163	1034	Nelson Mcmillan Nursery	Nursery	-£17,667	£42,936	£25,269	£330,238	66	8%	£383
13164	1028	Colne Newtown Nursery	Nursery	-£105,406	-£31,319	-£136,725	£543,852	68	-25%	-£2,011
14161	1031	Hillside Nursery	Nursery	-£6,068	£27,997	£21,929	£372,739	53	6%	£414
14162	1037	Bacup Nursery	Nursery	£47,198	£63,489	£110,687	£558,564	86	20%	£1,287
14163	1046	Staghills Nursery	Nursery	£91,344	£35,335	£126,679	£760,221	87	17%	£1,456
01001	2017	Bowerham Community	Primary	£213,746	£45,806	£259,552	£2,346,382	493	11%	£526
01002	2019	Dallas Road Community	Primary	£218,326	£117,676	£336,002	£2,034,065	396	17%	£848
01003	2024	Willow Lane Community	Primary	£147,095	-£7,034	£140,061	£1,252,948	199	11%	£704
01005	3530	Christ Church CE	Primary	£112,029	-£28,192	£83,836	£1,021,840	208	8%	£403
01006	3531	Scotforth St Paul's CE	Primary	£121,182	-£29,759	£91,422	£1,030,597	219	9%	£417
01009	3533	Skerton St Luke's CE	Primary	£120,848	-£9,057	£111,792	£1,156,522	199	10%	£562
01010	3706	The Cathedral Catholic	Primary	£159,142	-£14,121	£145,021	£1,105,209	205	13%	£707
01011	2020	Lancaster Ridge Primary	Primary	£218,497	-£36,646	£181,851	£999,972	141	18%	£1,290
01012	2021	Lancaster Ryelands	Primary	£296,391	-£44,275	£252,116	£2,393,413	372	11%	£678
01013	3520	Arkholme CE Primary	Primary	£52,372	£5,131	£57,504	£575,546	89	10%	£646
01014	3521	Caton St Paul's CE	Primary	£154,894	-£4,664	£150,231	£857,450	166	18%	£905
01015	2370	Moorside Primary	Primary	£328,160	-£129,465	£198,695	£3,117,540	622	6%	£319
01016	3527	St Wilfrid's CE. Halton	Primary	£279,551	-£8,293	£271,258	£1,086,377	235	25%	£1,154
01017	3528	Hornby St Margaret's CE	Primary	£63,165	-£9,849	£53,316	£350,713	48	15%	£1,111
01018	2031	Nether Kellet Community	Primary	£76,584	-£1,342	£75,243	£583,409	109	13%	£690
01019	3670	Ov Kell Wilson's Endowed	Primary	-£1,890	£3,283	£1,393	£686,340	122	0%	£11
01020	3534	Leck St Peter's CE	Primary	£61,901	£4,612	£66,513	£334,539	47	20%	£1,415
01021	3535	Melling St Wilfrid CE	Primary	£49,782	-£350	£49,431	£298,716	33	17%	£1,498
01022	3082	Quernmore CE Primary	Primary	£36,456	-£10,828	£25,628	£533,685	98	5%	£262
01023	3084	Tatham Fells CE Primary	Primary	£65,483	£14,374	£79,857	£346,592	40	23%	£1,996
01024	3607	St Bernadette's Catholic	Primary	£139,147	-£13,626	£125,522	£944,607	211	13%	£595
01025	2653	Caton Community Primary	Primary	£3,442	£16,191	£19,634	£387,881	70	5%	£280
01027	3017	Wray With Botton Endowed	Primary	£91,860	-£39,803	£52,057	£382,086	53	14%	£982
01028	3519	Cfth Christ Church CE	Primary	£52,838	-£34,675	£18,163	£691,760	115	3%	£158
01029	3543	Slyne-With-Hest St Lukes	Primary	£58,456	£29,052	£87,508	£1,132,371	221	8%	£396
01030	3518	Bolton-Le-Sands CE	Primary	£108,290	-£21,755	£86,535	£1,409,842	310	6%	£279
01031	3703	Our Lady Of Lourdes	Primary	£47,310	-£35,885	£11,426	£494,822	74	2%	£154
01032	3168	Archbishop Hutton's	Primary	£40,914	£29,474	£70,388	£630,104	98	11%	£718
01034	3551	Yealand CE Primary	Primary	£68,729	-£26,165	£42,564	£293,724	34	14%	£1,252
01035	3542	Silverdale St John's CE	Primary	£51,781	-£2,772	£49,009	£459,474	65	11%	£754
01036	3546	Thurnham Glasson CE	Primary	£65,280	-£560	£64,719	£246,090	12	26%	£5,393
01038	3522	Cockerham Parochial CE	Primary	-£2,018	-£8,566	-£10,584	£520,736	88	-2%	-£120
01039	3524	Dolphinholme CE Primary	Primary	£57,458	-£38,213	£19,245	£573,623	92	3%	£209
01041	3525	Ellel St John CE	Primary	£107,813	£4,105	£111,918	£1,015,736	211	11%	£530
01042	3539	Abbeystead Cawthorn End	Primary	£55,053	£7,665	£62,718	£277,953	34	23%	£1,845
01044	2014	Carnforth North Road	Primary	£15,434	£24,681	£40,115	£720,071	116	6%	£346
01046	3538	Overton St Helen's CE	Primary	£152,613	-£10,277	£142,336	£896,020	172	16%	£828

Sch no	DFE No	Sch name	Phase	Revenue open balance 1/04/21	Revenue in year movement 21/22	Revenue close balance 31/03/22	Revenue cfr income	NOR	Balance as % of CFR income	Balance per pupil
01049	2576	Great Wood Primary	Primary	£265,818	£54,495	£320,313	£2,002,379	418	16%	£766
01050	2425	Torrisholme Community	Primary	£173,988	£17,016	£191,004	£1,929,172	415	10%	£460
01051	2025	Morecambe Bay Community	Primary	£66	£30,706	£30,772	£1,934,572	306	2%	£101
01052	2029	West End Primary	Primary	£162,172	-£5,603	£156,568	£1,249,892	176	13%	£890
01053	2028	Sandylands Community	Primary	£224,503	£8,578	£233,081	£2,417,224	422	10%	£552
01054	2027	Lancaster Road Primary	Primary	£413,973	-£100,725	£313,249	£3,171,685	587	10%	£534
01055	3537	Poulton-Le-Sands CE	Primary	£110,646	£11,704	£122,350	£1,010,041	162	12%	£755
01056	3536	Heysham St Peter's CE	Primary	£124,216	£20,574	£144,790	£1,134,354	247	13%	£586
01057	3707	St Mary's Catholic Morecambe	Primary	£233,942	-£56,262	£177,680	£1,053,854	172	17%	£1,033
01058	2368	Trumacar Community	Primary	£316,445	£32,181	£348,627	£1,880,291	364	19%	£958
01059	3605	St Patrick's. Morecambe	Primary	£130,498	-£21,668	£108,830	£1,121,803	201	10%	£541
01060	2827	Westgate Primary School	Primary	£260,493	£10,009	£270,502	£3,116,599	591	9%	£458
01061	2831	Grosvenor Park Primary	Primary	£118,226	-£15,360	£102,867	£1,613,754	312	6%	£330
01062	2832	Mossgate Primary	Primary	£118,247	-£3,070	£115,177	£1,138,622	209	10%	£551
02001	2396	Carr Head Primary	Primary	£160,077	-£15,115	£144,962	£1,096,070	202	13%	£718
02002	2541	The Breck Primary	Primary	£168,254	-£39,383	£128,871	£1,404,910	283	9%	£455
02003	2622	Carleton Green Community	Primary	£209,349	£4,520	£213,869	£1,656,027	313	13%	£683
02005	3570	St Chad's CE Primary	Primary	£80,223	£16,805	£97,028	£1,075,567	244	9%	£398
02006	3719	St John's. Poulton	Primary	£80,218	£16,288	£96,506	£962,869	211	10%	£457
02007	3571	Carleton St Hilda's CE	Primary	£83,073	£7,967	£91,040	£968,128	199	9%	£457
02008	2822	Chaucer Community	Primary	£193,525	-£22,878	£170,647	£1,628,891	264	10%	£646
02009	3709	St Mary's Catholic Fleetwood	Primary	£70,894	£150	£71,045	£981,526	154	7%	£461
02013	2527	Larkholme Primary	Primary	£39,528	-£11,092	£28,436	£1,453,780	300	2%	£95
02014	2404	Charles Saer Community	Primary	£282,562	£25,516	£308,078	£1,991,493	323	15%	£954
02016	2821	Shakespeare Primary	Primary	£286,133	-£24,024	£262,109	£2,046,129	416	13%	£630
02017	3711	St Wulstans & St Edmunds	Primary	£77,606	-£53,422	£24,184	£1,264,809	222	2%	£109
02018	2836	Fleetwood Flakefleet	Primary	£216,108	-£166,817	£49,291	£2,698,440	481	2%	£102
02019	3126	Carter's Charity Primary	Primary	£128,844	-£21,476	£107,368	£950,960	180	11%	£596
02020	3572	Fleetwood's Charity CE	Primary	£140,174	-£30,029	£110,145	£785,337	118	14%	£933
02022	3568	Pilling St John's CE	Primary	£76,434	-£8,098	£68,337	£608,698	111	11%	£616
02023	3718	St William's Catholic	Primary	£5,289	£20,092	£25,381	£415,750	33	6%	£769
02024	3554	Great Eccleston Copp CE	Primary	£38,329	-£5,743	£32,586	£773,997	153	4%	£213
02025	3712	St Mary's. Gt Eccleston	Primary	£14,590	£24,919	£39,509	£324,812	42	12%	£941
02027	2045	Stalmine Primary	Primary	£55,777	£11,089	£66,866	£533,067	93	13%	£719
02030	2517	Stanah Primary	Primary	£263,302	-£42,190	£221,112	£1,928,149	400	11%	£553
02031	2492	Northfold Community	Primary	£195,501	-£17,217	£178,284	£1,038,158	210	17%	£849
02032	3720	Sacred Heart. Thornton	Primary	£122,668	£27,303	£149,970	£1,002,874	198	15%	£757
02033	3125	Baines Endowed Primary	Primary	£139,972	-£6,977	£132,994	£1,078,801	207	12%	£642
02035	2047	Thornton Primary	Primary	£52,589	£1,798	£54,387	£914,132	132	6%	£412
02036	2048	Royles Brook Primary	Primary	£144,667	-£7,177	£137,490	£1,379,734	296	10%	£464
02037	3016	Kirkland St Helen's CE	Primary	£91,095	-£43,244	£47,851	£732,600	155	7%	£309
02038	2030	Nateby Primary	Primary	£31,340	-£5,791	£25,549	£523,177	85	5%	£301
02039	2016	Forton Primary	Primary	£75,871	£2,057	£77,927	£436,798	71	18%	£1,098
02040	3548	St Michael's-On-Wyre CE	Primary	£73,399	-£17,696	£55,703	£717,347	119	8%	£468
02042	3704	St Mary's. Claughton	Primary	£63,598	-£6,888	£56,710	£329,267	43	17%	£1,319
02043	3516	Bilsborrow John Cross CE	Primary	£73,222	-£961	£72,261	£511,193	74	14%	£977
02044	3515	Calder Vale St Johns CE	Primary	£51,798	-£22,989	£28,809	£323,408	19	9%	£1,516
02045	3529	Inskip St Peter's CE	Primary	£61,157	-£2,380	£58,776	£382,317	58	15%	£1,013
02046	3526	Garstang St Thomas' CE	Primary	£151,731	-£31,193	£120,538	£1,061,079	213	11%	£566
02047	3550	Winmarleigh CE Primary	Primary	£97,415	£7,006	£104,421	£319,684	26	33%	£4,016
02048	3668	Scorton CE Primary	Primary	£45,556	-£37,109	£8,447	£360,281	54	2%	£156
02049	2530	Garstang Community	Primary	£87,423	-£15,552	£71,871	£974,056	205	7%	£351
02050	3702	Ss Mary & Michael	Primary	£45,295	-£5,799	£39,496	£645,357	112	6%	£353
02051	3075	Staining CE Primary	Primary	£99,690	-£70,831	£28,859	£1,034,746	223	3%	£129
02052	2826	Manor Beach Primary	Primary	£194,527	-£10,820	£183,707	£1,297,592	204	14%	£901
04029	3575	Weeton St Michael's CE	Primary	£66,218	£43,263	£109,482	£430,653	47	25%	£2,329
04030	3573	Ribby W Wrea Endowed CE	Primary	£107,789	£6,970	£114,760	£824,887	155	14%	£740
04032	3553	Freckleton CE Primary	Primary	£89,585	-£8,735	£80,850	£1,028,166	200	8%	£404
04033	3574	Singleton CE Primary	Primary	£77,296	-£11,879	£65,418	£534,349	104	12%	£629
04034	5200	Newton Bluecoat CE	Primary	£98,509	£3,594	£102,103	£1,094,660	203	9%	£503
04035	3616	Holy Family. Warton	Primary	£86,003	-£45,152	£40,851	£705,823	133	6%	£307

Sch no	DFE No	Sch name	Phase	Revenue open balance 1/04/21	Revenue in year movement 21/22	Revenue close balance 31/03/22	Revenue cfr income	NOR	Balance as % of CFR income	Balance per pupil
04036	2446	Freckleton Strike Lane	Primary	£39,868	£25,680	£65,548	£990,834	178	7%	£368
04037	3557	Kirkham St Michael's CE	Primary	£72,096	£23,488	£95,584	£1,121,284	192	9%	£498
04038	3713	The Willows Catholic	Primary	£155,119	-£27,269	£127,850	£1,054,155	212	12%	£603
04039	2041	Kirkham & Wesham Primary	Primary	£90,529	£4,431	£94,960	£1,025,763	203	9%	£468
04040	3717	St Joseph's. Wesham	Primary	£77,248	-£29,116	£48,132	£611,923	107	8%	£450
04041	3565	Medlar-With-Wesham CE	Primary	£150,734	-£32,227	£118,507	£975,525	199	12%	£596
04042	3976	Treales CE Primary	Primary	£61,872	-£18,575	£43,297	£415,665	61	10%	£710
04043	2406	Weeton Primary	Primary	£228,434	-£15,273	£213,161	£1,150,212	182	19%	£1,171
04044	2426	Lytham St Annes Mayfield	Primary	£130,384	-£35,387	£94,997	£1,473,977	269	6%	£353
04045	2497	Lytham St Annes Clifton	Primary	£91,425	-£50,930	£40,494	£1,425,415	255	3%	£159
04046	2042	Lytham St Annes Ansdell	Primary	£84,603	£35,374	£119,977	£1,252,704	243	10%	£494
04047	3814	Heyhouses Endowed CE	Primary	£180,917	£43,878	£224,796	£2,887,708	600	8%	£375
04048	3715	Our Lady Star Of The Sea	Primary	£120,980	£11,851	£132,831	£1,069,557	210	12%	£633
04049	3562	Lytham CE Primary	Primary	£81,431	-£29,233	£52,198	£1,086,899	203	5%	£257
04050	3716	St Peter's Catholic	Primary	£31,676	-£6,047	£25,628	£1,120,441	201	2%	£128
04051	3564	St Thomas' CE Primary	Primary	£88,717	-£6,687	£82,029	£980,881	207	8%	£396
04052	2615	Lytham Hall Park	Primary	£232,181	£32,387	£264,568	£1,949,962	406	14%	£652
06001	3638	Blessed Sacrament	Primary	£297,956	£14,885	£312,840	£2,275,807	378	14%	£828
06002	2185	Brookfield Community	Primary	£114,203	-£16,419	£97,784	£1,099,792	185	9%	£529
06005	2188	Eldon Primary	Primary	£239,443	£20,273	£259,716	£1,296,291	229	20%	£1,134
06007	3639	English Martyrs Catholic	Primary	£109,088	-£45,784	£63,304	£1,175,146	219	5%	£289
06008	2189	Brockholes Wood Primary	Primary	£168,259	£6,931	£175,190	£1,374,868	241	13%	£727
06009	2190	Frenchwood Community	Primary	£237,215	-£65,131	£172,085	£1,699,486	325	10%	£529
06010	2191	Preston Grange Primary	Primary	£213,708	-£21,603	£192,104	£1,126,609	185	17%	£1,038
06011	2192	Greenlands Community	Primary	£121,543	£13,478	£135,021	£1,262,788	198	11%	£682
06012	2193	Holme Slack Community	Primary	£203,466	-£55,571	£147,895	£1,362,583	198	11%	£747
06013	3653	Holy Family Catholic	Primary	£130,027	-£32,119	£97,908	£865,809	166	11%	£590
06014	2200	Ingol Primary	Primary	£183,743	-£48,426	£135,317	£1,192,521	184	11%	£735
06016	2196	Moor Nook Community	Primary	£200,909	£17,240	£218,150	£1,370,509	212	16%	£1,029
06019	2195	Ribbleton Avenue Infant	Primary	£139,417	-£37,575	£101,842	£1,266,086	237	8%	£430
06020	3001	Ribbleton Ave Meth Jnr	Primary	£225,386	£70,780	£296,166	£1,503,980	262	20%	£1,130
06021	2197	The Roebuck	Primary	£189,998	£38,453	£228,451	£1,694,868	309	13%	£739
06022	3642	Sacred Heart. Preston	Primary	£245,350	-£42,663	£202,687	£1,039,059	191	20%	£1,061
06023	3634	St Andrew's CE	Primary	£230,389	-£43,357	£187,032	£1,972,497	418	9%	£447
06024	3643	St Augustine's Catholic	Primary	£214,151	-£57,121	£157,030	£1,397,736	255	11%	£616
06025	3352	St Bernard's Catholic	Primary	£153,127	£6,751	£159,879	£1,157,422	213	14%	£751
06026	3646	St Gregory's Catholic	Primary	£138,573	-£28,605	£109,968	£1,113,540	206	10%	£534
06027	3647	St Ignatius Catholic	Primary	£139,994	-£15,273	£124,721	£983,807	180	13%	£693
06028	3322	St Joseph's. Preston	Primary	£312,307	-£69,443	£242,864	£1,881,192	328	13%	£740
06029	3645	St Maria Goretti	Primary	£124,394	£56,920	£181,314	£1,093,410	209	17%	£868
06031	3009	St Stephens CE	Primary	£261,779	-£55,956	£205,822	£1,635,259	296	13%	£695
06033	2198	Ashton Primary	Primary	£186,593	-£39,426	£147,168	£1,191,016	211	12%	£697
06035	2704	Preston Fishwick Primary	Primary	£132,904	-£8,804	£124,101	£1,201,223	147	10%	£844
06036	3954	St Teresa's. Preston	Primary	£151,780	£37,531	£189,310	£1,102,071	181	17%	£1,046
06037	2054	Lea Community Primary	Primary	£93,955	£87,348	£181,303	£1,501,223	241	12%	£752
06038	3582	Lea Neeld's Endowed CE	Primary	£74,542	-£46,262	£28,281	£759,889	141	4%	£201
06039	3726	Lea St Mary's Catholic	Primary	£89,691	£5,569	£95,259	£572,911	104	17%	£916
06040	2062	Catforth Primary	Primary	£114,870	£16,096	£130,966	£527,118	88	25%	£1,488
06041	2818	Sherwood Primary	Primary	£247,568	-£18,883	£228,686	£1,957,402	422	12%	£542
06042	2838	Cottam Primary	Primary	£81,488	£25,183	£106,671	£1,028,151	211	10%	£506
06043	3597	Woodplumpton St Annes CE	Primary	£47,713	-£7,123	£40,590	£574,721	104	7%	£390
06044	3578	Broughton CE Primary	Primary	£86,642	£55,910	£142,551	£1,368,553	277	10%	£515
06046	3577	Barton St Lawrence CE	Primary	£97,942	-£1,231	£96,711	£848,375	186	11%	£520
06047	3339	St Marys & St Andrews	Primary	£112,540	£5,179	£117,719	£680,464	122	17%	£965
06048	3579	Oliverson's CE Primary	Primary	£71,920	-£21,968	£49,952	£914,165	192	5%	£260
06049	3725	St Francis Catholic	Primary	£81,802	-£8,447	£73,355	£690,040	92	11%	£797
06050	2053	Goosnargh Whitechapel	Primary	£79,444	-£26,394	£53,050	£466,380	85	11%	£624
06051	3580	Grimsargh St Michael's	Primary	£137,491	-£30,482	£107,009	£1,059,664	207	10%	£517
06052	3601	Our Lady & St Edward's	Primary	£140,114	£6,181	£146,295	£1,063,924	210	14%	£697
06053	3949	St Anthony's Catholic	Primary	£103,193	£40,477	£143,670	£1,483,753	315	10%	£456
06054	3611	St Clare's Catholic	Primary	£146,742	-£3,001	£143,741	£1,211,764	253	12%	£568

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06055	2052	Kennington Primary	Primary	£79,624	-£7,203	£72,421	£1,271,702	245	6%	£296
06056	3301	Fulwood St Peter's CE	Primary	£142,494	-£58,606	£83,888	£1,118,339	237	8%	£354
06057	2050	Fulwood & Cadley Primary	Primary	£235,047	-£88,167	£146,880	£1,532,107	313	10%	£469
06058	2051	Harris Primary	Primary	£133,159	-£10,975	£122,184	£1,000,639	210	12%	£582
06060	2509	Queen's Drive Primary	Primary	£412,772	£107,742	£520,514	£2,189,155	418	24%	£1,245
06062	2703	Pool House Community	Primary	£157,649	-£31,254	£126,395	£1,093,066	174	12%	£726
06064	3129	Brabin's Endowed	Primary	£40,932	£53,014	£93,946	£556,322	71	17%	£1,323
06065	3743	St Mary's. Chipping	Primary	£56,213	-£11,176	£45,037	£353,840	36	13%	£1,251
06066	3727	Alston Lane Catholic	Primary	£177,555	£35,533	£213,088	£1,134,174	232	19%	£918
06067	3583	Longridge CE Primary	Primary	£114,064	-£32,621	£81,443	£834,594	181	10%	£450
06068	5203	Barnacre Rd Primary	Primary	£12,425	-£6,306	£6,118	£1,054,347	211	1%	£29
06069	3728	St Wilfrid's. Longridge	Primary	£190,617	£29,700	£220,317	£936,617	181	24%	£1,217
06070	3589	Ribchester St Wilfrid's	Primary	£54,500	-£27,582	£26,918	£450,288	84	6%	£320
06071	2833	Longsands Community	Primary	£192,604	-£52,587	£140,017	£987,085	208	14%	£673
06604	2187	Deepdale Infants	Primary	£352,274	-£153,519	£198,755	£3,173,187	626	6%	£318
07001	2842	Cuerden Church	Primary	£127,613	-£17,869	£109,743	£1,043,219	201	11%	£546
07004	3736	Our Lady & St Gerards RC	Primary	£309,626	£86,980	£396,606	£1,584,523	339	25%	£1,170
07005	3127	Higher Walton CE Primary	Primary	£46,107	£12,176	£58,284	£739,149	116	8%	£502
07006	3738	St Patrick's RC Primary	Primary	£63,543	£25,374	£88,917	£936,079	182	9%	£489
07007	3085	St Aidan's CE Primary	Primary	£83,607	-£16,016	£67,591	£814,238	136	8%	£497
07008	3596	St Leonard's CE Primary	Primary	£104,010	£1,887	£105,897	£1,344,454	279	8%	£380
07009	2060	Lostock Hall Community	Primary	£269,736	-£58,033	£211,703	£2,113,178	425	10%	£498
07012	2437	Walton-Le-Dale Community	Primary	£155,703	£82,677	£238,381	£2,163,705	428	11%	£557
07013	2637	Coupe Green Primary	Primary	£69,217	£3,508	£72,725	£770,864	150	9%	£485
07014	3981	St Mary & Benedict's RC	Primary	£254,708	-£67,758	£186,950	£1,478,719	292	13%	£640
07015	3025	St Andrew's CE Infant	Primary	£148,220	£37,254	£185,473	£1,052,659	173	18%	£1,072
07016	3141	Leyland Methodist Junior	Primary	£216,221	£43,682	£259,903	£1,301,272	269	20%	£966
07017	3411	Leyland St James CE	Primary	£118,051	-£13,467	£104,584	£1,266,138	227	8%	£461
07018	3793	St Mary's RC. Leyland	Primary	£206,725	-£46,894	£159,831	£1,399,762	264	11%	£605
07019	2150	Woodlea Junior	Primary	£197,843	£31,706	£229,549	£1,250,020	236	18%	£973
07020	2554	Lever House Primary	Primary	£249,014	-£37,850	£211,165	£1,458,338	314	14%	£672
07021	3608	St Catherine's Catholic	Primary	£121,504	-£19,925	£101,579	£1,070,752	225	9%	£451
07022	3600	St Anne's Catholic	Primary	£108,933	£30,996	£139,929	£1,068,716	185	13%	£756
07025	2427	Seven Stars Primary	Primary	£76,903	-£47,443	£29,460	£1,456,342	218	2%	£135
07026	2814	Moss Side Primary	Primary	£195,109	-£29,849	£165,259	£1,251,443	251	13%	£658
07028	3666	Farington St Paul's CE	Primary	£169,673	-£6,309	£163,363	£956,624	195	17%	£838
07030	2830	Longton Primary	Primary	£70,734	-£3,621	£67,113	£1,042,973	207	6%	£324
07032	3729	St Oswald's. Longton	Primary	£147,658	-£17,363	£130,295	£1,124,478	242	12%	£538
07033	3585	New Longton All Saints'	Primary	£122,974	£47,003	£169,977	£1,030,971	213	16%	£798
07036	3586	Hoole St Michael CE	Primary	£37,056	-£13,828	£23,229	£526,726	97	4%	£239
07037	2055	Little Hoole Primary	Primary	£19,794	£22,208	£42,003	£950,135	202	4%	£208
07039	3018	Cop Lane CE Primary	Primary	£77,017	-£34,752	£42,264	£947,962	208	4%	£203
07040	3089	Middleforth CE Primary	Primary	£183,796	£33,821	£217,617	£1,146,756	203	19%	£1,072
07041	3019	Howick CE Primary	Primary	£38,256	£1,007	£39,264	£571,949	107	7%	£367
07042	3730	St Mary Magdalen's	Primary	£38,319	£18,640	£56,959	£1,026,872	212	6%	£269
07043	2058	Penwortham Primary	Primary	£95,749	-£19,890	£75,860	£929,538	208	8%	£365
07044	2514	Whitefield Primary	Primary	£204,803	£91,200	£296,003	£1,869,111	391	16%	£757
07045	3953	St Teresa's. Penwortham	Primary	£150,440	-£34,558	£115,881	£1,272,001	272	9%	£426
07046	2405	Kingsfold Primary	Primary	£158,127	£67,655	£225,782	£820,478	109	28%	£2,071
07047	2815	Penwortham Broad Oak	Primary	£149,278	£7,049	£156,326	£1,084,610	191	14%	£818
07051	3590	Samlesbury CE	Primary	£61,615	£15,615	£77,230	£461,941	74	17%	£1,044
07616	3143	Leyland Methodist Infant	Primary	£174,724	-£52,316	£122,408	£964,011	200	13%	£612
08001	3078	Burs Bridge.St John's CE	Primary	£67,519	-£49,261	£18,258	£802,794	168	2%	£109
08002	3146	Burs Bridge Methodist	Primary	£63,438	£9,274	£72,713	£396,091	50	18%	£1,454
08003	3800	St John's Burscough	Primary	£108,579	-£53,987	£54,592	£519,231	93	11%	£587
08004	3029	Lathom Park CE Primary	Primary	£73,045	-£34,995	£38,050	£429,323	47	9%	£810
08005	3426	Newburgh CE Primary	Primary	£65,978	-£32,092	£33,886	£676,811	130	5%	£261
08006	3080	Lathom St James' CE	Primary	£63,148	£5,841	£68,989	£613,379	108	11%	£639
08007	3424	Lordsgate Township CE	Primary	£139,877	-£46,674	£93,203	£857,170	189	11%	£493
08009	2597	Ormskirk Asmall Primary	Primary	£73,117	-£6,115	£67,002	£907,844	136	7%	£493
08011	3031	Ormskirk CE Primary	Primary	£122,676	-£6,030	£116,646	£2,323,336	394	5%	£296

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08012	3801	Ormskirk St Anne's	Primary	£240,184	£36,181	£276,365	£1,808,785	348	15%	£794
08014	2415	Ormskirk West End	Primary	£58,588	£7,033	£65,622	£627,298	94	10%	£698
08016	2695	Burscough Village	Primary	£88,894	£17,764	£106,658	£1,106,030	205	10%	£520
08018	3087	Bickerstaffe CE	Primary	£121,342	£2,883	£124,226	£565,128	90	22%	£1,380
08019	2443	Aughton Town Green	Primary	£56,340	£17,784	£74,123	£1,567,857	334	5%	£222
08020	3026	Christ Church CE Primary	Primary	£81,303	£37,036	£118,339	£985,129	208	12%	£569
08021	3108	Aughton St Michael's CE	Primary	£52,351	-£5,714	£46,638	£984,289	203	5%	£230
08022	5206	Rufford CE Primary	Primary	£94,747	£5,413	£100,160	£705,369	142	14%	£705
08023	3147	Holmeswood Methodist	Primary	£75,736	-£4,528	£71,207	£451,749	52	16%	£1,369
08024	3185	Richard Durnings Endowed	Primary	£26,873	-£11,019	£15,853	£496,652	82	3%	£193
08025	3419	Haskayne CE Primary	Primary	£29,250	-£12,590	£16,659	£360,277	46	5%	£362
08026	3420	Halsall St Cuthbert's CE	Primary	£69,889	-£48,697	£21,192	£719,293	164	3%	£129
08027	3191	Scarisbrick St Mark's CE	Primary	£69,892	£3,859	£73,750	£416,719	48	18%	£1,536
08028	3803	Scarisbrick St Mary's	Primary	£13,856	£24,291	£38,147	£635,698	90	6%	£424
08029	2156	Pinfold Primary	Primary	£99,816	-£39,032	£60,784	£319,754	28	19%	£2,171
08031	3804	St Richards.Skelmersdale	Primary	£203,296	-£109,684	£93,612	£1,202,632	219	8%	£427
08033	2656	Holland Moor Primary	Primary	£183,349	-£46,846	£136,504	£2,486,679	488	5%	£280
08034	2696	Cobbs Brow	Primary	£178,426	-£24,035	£154,391	£1,599,662	318	10%	£486
08036	3614	St James'. Skelmersdale	Primary	£125,901	-£40,442	£85,459	£911,048	189	9%	£452
08038	3179	Skelmersdale Trinity	Primary	£100,548	-£39,168	£61,380	£1,333,559	248	5%	£247
08040	2705	Crow Orchard Primary	Primary	£129,234	-£1,981	£127,252	£769,813	110	17%	£1,157
08043	2525	Little Digmaor Primary	Primary	-£4,877	-£9,575	-£14,452	£799,497	128	-2%	-£113
08045	3677	Bishop Martin CE Primary	Primary	£162,692	-£78,171	£84,521	£1,368,364	220	6%	£384
08046	2526	Hillside Community	Primary	£162,335	-£60,114	£102,221	£1,101,517	195	9%	£524
08050	3618	St Edmunds.Skelmersdale	Primary	£22,077	£22,752	£44,829	£662,384	77	7%	£582
08051	3610	St John's. Skelmersdale	Primary	£343,291	-£60,155	£283,137	£1,131,096	185	25%	£1,530
08054	2552	Delph Side Community	Primary	£133,393	£11,944	£145,337	£1,440,460	230	10%	£632
08060	3833	St Teresa's. Up Holland	Primary	£108,563	£28,919	£137,482	£1,082,215	223	13%	£617
08061	3459	Up Holland Roby Mill CE	Primary	£166,675	-£27,325	£139,350	£250,750	15	56%	£9,290
08062	3457	St Thomas The Martyr CE	Primary	£251,755	-£87,523	£164,233	£1,082,566	207	15%	£793
08063	2183	Crawford Village Primary	Primary	£73,835	£20	£73,854	£492,082	79	15%	£935
08064	2184	Wrightington Mossy Lea	Primary	-£3,134	-£1,474	-£4,607	£221,189	20	-2%	-£230
08066	3461	Appley Bridge All Saints	Primary	£93,367	-£24,007	£69,359	£716,707	147	10%	£472
08067	3834	St Josephs. Wrightington	Primary	£66,877	-£21,962	£44,915	£648,418	111	7%	£405
08069	3831	Our Lady & All Saints RC	Primary	£68,634	-£33,389	£35,245	£615,490	105	6%	£336
08070	3448	Dalton St Michael's CE	Primary	£17,965	-£13,180	£4,786	£480,005	70	1%	£68
08071	2059	Tarleton Community	Primary	£40,744	£51,722	£92,466	£1,231,909	235	8%	£393
08072	3592	Tarleton Mere Brow CE	Primary	£13,590	-£16,793	-£3,203	£497,727	80	-1%	-£40
08073	3591	Tarleton Holy Trinity CE	Primary	£90,522	-£10,190	£80,333	£945,836	196	8%	£410
08074	3581	Hesketh With Bec'sall CE	Primary	£94,082	£53,025	£147,107	£1,000,687	211	15%	£697
08076	3169	Banks Methodist Primary	Primary	£85,582	-£11,123	£74,460	£511,153	75	15%	£993
08077	3098	Banks St Stephen's CE	Primary	£62,173	-£51,873	£10,300	£847,169	166	1%	£62
08078	3995	Brookfield Park	Primary	£120,430	-£8,497	£111,933	£979,125	170	11%	£658
08079	3996	Woodland	Primary	£208,721	£69,153	£277,874	£2,364,634	369	12%	£753
08080	3998	St Francis Of Assisi	Primary	£140,382	£38,233	£178,615	£1,218,859	168	15%	£1,063
09001	3389	Chorley All Saints' CE	Primary	£103,055	£5,296	£108,351	£1,308,166	219	8%	£495
09002	2835	Duke Street Primary	Primary	£212,188	£25,179	£237,367	£1,767,253	328	13%	£724
09003	2145	Highfield Primary	Primary	£63,841	-£63,771	£69	£1,597,040	254	0%	£0
09005	3390	St Laurence CE Primary	Primary	£138,947	£1,223	£140,170	£1,003,687	207	14%	£677
09006	3783	Sacred Heart. Chorley	Primary	£177,009	-£16,300	£160,709	£1,087,439	213	15%	£755
09007	3393	St George's CE Primary	Primary	£124,158	-£1,685	£122,473	£1,507,430	294	8%	£417
09008	3397	Chorley St James' CE	Primary	£113,625	£12,288	£125,914	£1,226,820	222	10%	£567
09009	3785	St Josephs. Chorley	Primary	£79,049	-£35,543	£43,506	£1,030,877	200	4%	£218
09010	2679	Gillibrand Primary	Primary	£252,175	-£79,801	£172,373	£1,112,323	209	15%	£825
09011	3786	St Mary's. Chorley	Primary	£71,734	£28,454	£100,188	£1,152,087	229	9%	£438
09012	5201	Chorley St Peter's CE	Primary	£279,044	£96,574	£375,618	£1,801,831	332	21%	£1,131
09014	3789	St Gregory's. Chorley	Primary	£140,459	-£12,162	£128,298	£1,052,175	212	12%	£605
09015	2146	Buckshaw Primary	Primary	£115,180	£23,244	£138,424	£1,263,657	232	11%	£597
09019	3481	Rivington Primary	Primary	-£14,842	£49,157	£34,315	£729,227	114	5%	£301
09022	2698	Adlington Primary	Primary	£67,912	-£16,598	£51,313	£777,773	140	7%	£367
09023	3796	St Joseph's Withnell	Primary	£53,128	-£50,389	£2,739	£571,626	100	0%	£27

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09024	2684	Lancaster Lane Community	Primary	£103,719	£6,374	£110,093	£1,143,693	210	10%	£524
09025	2636	Manor Road Primary	Primary	£116,194	£56,152	£172,346	£1,246,599	247	14%	£698
09026	2817	Westwood Primary	Primary	£107,754	-£56,879	£50,875	£961,047	186	5%	£274
09027	3781	Anderton St Joseph's	Primary	£76,236	£34,370	£110,607	£868,042	185	13%	£598
09028	2140	Anderton Primary	Primary	£47,579	-£31,547	£16,032	£965,911	190	2%	£84
09029	3386	Bretherton Endowed CE	Primary	£44,184	£20,589	£64,773	£650,761	110	10%	£589
09030	3387	Brindle St James' CE	Primary	£71,300	£831	£72,131	£438,315	66	16%	£1,093
09031	2142	Gregson Lane Primary	Primary	£37,144	-£36,266	£879	£929,444	178	0%	£5
09032	3782	St Joseph's. Brindle	Primary	£84,643	-£8,288	£76,355	£531,609	90	14%	£848
09033	3388	Charnock Richard CE	Primary	£121,433	£14,688	£136,122	£920,478	196	15%	£694
09034	3790	St Bede's. Clayton Green	Primary	£149,852	-£54,519	£95,332	£1,070,833	221	9%	£431
09035	3401	Clayton-Le-Woods CE	Primary	-£14,258	£6,577	-£7,682	£1,029,095	213	-1%	-£36
09036	3402	Coppull St John's CE	Primary	£130,171	-£40,309	£89,862	£608,794	113	15%	£795
09037	3403	Coppull Parish CE	Primary	£78,644	£13,336	£91,980	£981,893	213	9%	£432
09038	3791	St Oswald's. Coppull	Primary	£110,346	-£43,229	£67,117	£567,392	110	12%	£610
09039	2147	Coppull Primary	Primary	£229,527	-£157,838	£71,689	£1,756,311	320	4%	£224
09040	3343	Croston CE/Methodist	Primary	£141,407	-£18,266	£123,141	£1,008,635	212	12%	£581
09042	3406	Eccleston St Mary's CE	Primary	£106,074	-£12,308	£93,766	£934,310	198	10%	£474
09043	3407	Euxton CE Primary	Primary	£81,622	£32,453	£114,076	£1,129,628	212	10%	£538
09044	3792	Euxton St Marys Catholic	Primary	£55,649	-£33,152	£22,497	£938,504	206	2%	£109
09045	2572	Euxton Primrose Hill	Primary	£185,680	£117,094	£302,774	£2,141,002	423	14%	£716
09046	3409	Heskin Pemberton's CE	Primary	£70,692	-£34,363	£36,329	£559,642	101	6%	£360
09048	3412	Mawdesley St Peter's CE	Primary	£33,159	£712	£33,872	£537,336	87	6%	£389
09049	3794	Ss Peter And Paul	Primary	£11,980	-£8,899	£3,081	£370,173	45	1%	£68
09050	2577	Balshaw Lane Community	Primary	£186,237	£38,676	£224,913	£1,647,089	359	14%	£626
09052	2574	Eccleston Primary	Primary	£190,747	-£134,887	£55,860	£1,159,971	213	5%	£262
09053	2702	Clayton Brook Primary	Primary	£118,779	-£38,268	£80,511	£1,150,883	162	7%	£497
09054	3795	St Chad's Catholic	Primary	£28,315	£360	£28,675	£745,066	141	4%	£203
09055	3414	Whittle-Le-Woods CE	Primary	£163,404	£23,857	£187,262	£1,284,017	243	15%	£771
09060	3997	St John's CE/Methodist	Primary	£149,141	-£3,902	£145,239	£1,043,779	210	14%	£692
09062	2565	Abbey Village Primary	Primary	£14,052	-£19,699	-£5,647	£415,881	49	-1%	-£115
09063	2564	Withnell Fold Primary	Primary	£54,278	-£4,401	£49,877	£484,045	86	10%	£580
09064	5207	Trinity C Of E	Primary	£567,034	£128,612	£695,646	£2,765,260	625	25%	£1,113
11001	3334	Baxenden St John's CE	Primary	£87,648	-£14,484	£73,164	£1,006,348	205	7%	£357
11002	3336	Benjamin Hargreaves CE	Primary	£71,125	-£21,430	£49,695	£856,393	161	6%	£309
11003	3337	Green Haworth CE Primary	Primary	£71,345	-£49,087	£22,258	£492,809	74	5%	£301
11005	2097	Hyndburn Park Primary	Primary	£374,301	£67,742	£442,043	£2,372,258	458	19%	£965
11006	2099	Peel Park Primary	Primary	£293,304	-£18,204	£275,100	£3,143,134	619	9%	£444
11008	3762	St Anne & St Joseph's RC	Primary	£204,322	£116,941	£321,263	£1,347,266	202	24%	£1,590
11010	3340	St John/St Augustine CE	Primary	£80,570	£68,698	£149,268	£1,176,918	199	13%	£750
11011	3342	St Mary Magdalen's CE	Primary	£133,607	-£25,790	£107,818	£1,163,551	195	9%	£553
11012	3763	St Oswald's. Accrington	Primary	£139,282	£38,444	£177,725	£957,033	159	19%	£1,118
11013	3105	St Peters CE	Primary	£38,178	-£10,403	£27,776	£925,993	153	3%	£182
11014	2101	Spring Hill Primary	Primary	£79,411	-£76,387	£3,024	£2,152,652	389	0%	£8
11015	2820	Woodnook Primary	Primary	£290,159	-£23,005	£267,154	£1,214,109	194	22%	£1,377
11018	3134	Hippings Methodist	Primary	£96,884	-£44,515	£52,369	£1,016,577	198	5%	£264
11020	3195	St Andrew's CE Primary	Primary	£89,912	-£23,278	£66,634	£1,692,225	297	4%	£224
11021	3353	Knuzden St Oswald's CE	Primary	£44,986	-£25,021	£19,965	£946,995	188	2%	£106
11023	3766	St Mary's. Oswaldtwistle	Primary	£234,369	-£35,529	£198,841	£1,263,668	266	16%	£748
11025	2107	Oswaldtwistle Moor End	Primary	£129,835	-£4,919	£124,916	£1,184,494	203	11%	£615
11026	3355	Oswaldtwistle St Paul's	Primary	£177,051	-£32,702	£144,349	£978,518	150	15%	£962
11029	2105	Mount Pleasant Primary	Primary	£272,165	-£27,097	£245,068	£1,938,444	394	13%	£622
11030	3765	St Mary's RC	Primary	£68,077	-£34,695	£33,382	£726,674	123	5%	£271
11031	3347	Church. St Nicholas CE	Primary	£159,594	-£22,506	£137,088	£1,146,969	200	12%	£685
11033	3764	Sacred Heart RC. Church	Primary	£147,421	-£74,772	£72,649	£1,209,957	201	6%	£361
11036	3599	Altham St James CE	Primary	£47,498	-£18,954	£28,545	£437,837	68	7%	£420
11038	3307	St Bartholomew's CE Great Harwood	Primary	£163,924	£41,382	£205,306	£1,105,270	207	19%	£992
11039	3308	Gt Harwood St John's CE	Primary	£72,997	-£36,535	£36,462	£852,200	140	4%	£260
11040	3746	Our Lady & St Hubert RC	Primary	£39,873	-£34,349	£5,524	£801,617	159	1%	£35
11041	3747	St Wulstan's RC	Primary	£62,224	-£41,414	£20,810	£910,422	165	2%	£126
11042	2067	Great Harwood Primary	Primary	£45,278	£21,885	£67,163	£1,071,392	194	6%	£346

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11045	3130	Rishton Methodist	Primary	£159,699	-£7,933	£151,766	£952,447	164	16%	£925
11046	3316	St Peter's & St Pauls CE	Primary	£133,823	£83,137	£216,960	£963,101	183	23%	£1,186
11047	3752	St Charles' RC. Rishton	Primary	£19,086	-£24,512	-£5,427	£918,125	173	-1%	-£31
11048	3741	St Joseph's. Hurst Green	Primary	£109,198	-£67,505	£41,693	£574,664	104	7%	£401
11050	3302	Langho St Leonard's CE	Primary	£201,559	£103,629	£305,188	£1,372,630	283	22%	£1,078
11051	3742	Langho St Mary's RC	Primary	£130,914	£28,219	£159,133	£1,263,055	287	13%	£554
11052	3809	Bolton By Bowland CE	Primary	£55,913	-£16,165	£39,748	£349,549	33	11%	£1,204
11053	3810	Thornleyholme RC Primary	Primary	£46,666	£8,489	£55,155	£259,304	26	21%	£2,121
11054	3303	Chatburn CE Primary	Primary	£56,420	£9,216	£65,635	£620,081	129	11%	£509
11055	2651	Brookside Primary	Primary	£67,563	-£8,500	£59,063	£961,666	159	6%	£371
11056	2391	Edisford Primary	Primary	-£83,816	£67,952	-£15,864	£1,163,640	232	-1%	-£68
11057	2064	Clitheroe Pendle Primary	Primary	£199,173	£12,691	£211,864	£1,595,943	347	13%	£611
11058	3304	St James' CE. Clitheroe	Primary	£210,410	£55,817	£266,227	£1,640,735	279	16%	£954
11059	3744	St Michael & John's RC	Primary	£44,357	-£33,846	£10,511	£799,872	164	1%	£64
11060	3319	Simonstone St Peter's CE	Primary	£81,343	£5,640	£86,983	£667,208	128	13%	£680
11061	2266	Gisburn Primary	Primary	£86,609	£5,381	£91,991	£697,867	143	13%	£643
11063	3807	Grindleton CE Primary	Primary	£72,852	-£4,654	£68,198	£395,897	40	17%	£1,705
11064	3111	Read St John's CE	Primary	£120,449	-£40,256	£80,194	£835,614	184	10%	£436
11065	2073	Sabden Primary	Primary	£89,669	-£26,285	£63,384	£503,885	93	13%	£682
11066	3753	St Mary's RC. Sabden	Primary	£72,774	£14,230	£87,004	£521,174	80	17%	£1,088
11067	3408	Brennands Endowed	Primary	£19,091	£4,055	£23,145	£335,153	36	7%	£643
11068	3808	West Bradford CE Primary	Primary	£4,236	-£24,013	-£19,776	£885,099	192	-2%	-£103
11069	3321	Whalley CE Primary	Primary	£58,750	-£29,367	£29,383	£1,398,171	314	2%	£94
11070	3131	Barrow	Primary	-£49,665	£15,293	-£34,372	£768,631	147	-4%	-£234
11071	3300	Balderstone St Leonard's	Primary	£61,616	-£8,627	£52,989	£638,495	116	8%	£457
11072	3312	Mellor St Mary CE	Primary	£93,765	£8,910	£102,675	£690,245	144	15%	£713
11073	3748	Osbaldeston St Mary's RC	Primary	-£135	£13,500	£13,365	£482,526	89	3%	£150
11074	5202	Salesbury CE Primary	Primary	£52,989	£16,869	£69,858	£1,460,132	283	5%	£247
12001	2076	Briercliffe Primary	Primary	£37,606	£88,470	£126,076	£1,821,030	346	7%	£364
12002	2095	Worsthorne Primary	Primary	£53,934	£35,502	£89,436	£1,000,681	212	9%	£422
12003	3324	St John's Cofe Cliviger	Primary	£79,663	£31,794	£111,457	£931,014	192	12%	£581
12005	3021	Padiham Green CE Primary	Primary	£194,280	£3,383	£197,663	£1,212,405	202	16%	£979
12006	2071	Padiham Primary	Primary	£226,629	£28,114	£254,742	£1,645,850	294	15%	£866
12007	3749	St John The Baptist RC	Primary	£44,552	-£13,913	£30,639	£1,209,329	225	3%	£136
12008	3313	Padiham St Leonard's CE	Primary	£232,993	-£27,599	£205,394	£1,786,839	333	11%	£617
12011	3181	Hapton CE/Methodist	Primary	£78,171	£40,170	£118,341	£732,274	122	16%	£970
12012	2228	Barden Primary School	Primary	£267,788	£68,220	£336,008	£2,567,465	448	13%	£750
12013	2164	Burnley Brunshaw Primary	Primary	£184,157	-£34,834	£149,323	£2,268,858	405	7%	£369
12015	3434	Christ The King RC	Primary	£151,382	-£26,014	£125,368	£1,083,462	210	12%	£597
12020	2230	Heasandford Primary	Primary	£582,076	-£24,393	£557,683	£3,147,187	620	18%	£899
12021	3431	Holy Trinity CE Primary	Primary	£259,188	-£34,601	£224,587	£1,241,451	208	18%	£1,080
12022	2237	Ightenhill Primary	Primary	£359,389	£24,232	£383,621	£2,054,007	347	19%	£1,106
12023	2162	Lowerhouse Junior	Primary	£2,948	£419	£3,367	£1,191,930	219	0%	£15
12025	2226	Rosegrove Infant	Primary	£90,742	-£4,634	£86,108	£927,775	171	9%	£504
12029	3433	St James' Lanehead CE	Primary	£114,429	-£6,661	£107,768	£1,354,965	278	8%	£388
12031	3980	St Mary's RC. Burnley	Primary	£65,575	-£9,300	£56,275	£1,209,453	204	5%	£276
12032	3435	St Mary Magdalene's RC	Primary	£33,517	£52,255	£85,773	£997,029	200	9%	£429
12033	3430	Burnley St Peter's CE	Primary	£61,248	£34,279	£95,526	£1,267,377	208	8%	£459
12034	3432	Burnley St Stephen's CE	Primary	£132,428	-£16,328	£116,100	£1,196,657	210	10%	£553
12035	2224	Stoneyholme Community	Primary	£446,909	-£73,468	£373,441	£2,463,040	418	15%	£893
12037	2235	Whittlefield Primary	Primary	£105,795	£452	£106,247	£1,506,259	224	7%	£474
12040	3440	Wellfield Church	Primary	£155,737	-£12,134	£143,603	£967,032	198	15%	£725
12041	2839	Rosewood Primary	Primary	£330,174	-£20,156	£310,018	£2,261,893	430	14%	£721
12042	2840	Cherry Fold Community	Primary	£338,949	-£62,328	£276,621	£2,476,638	384	11%	£720
12043	2841	Burnley Springfield	Primary	£256,189	£8,193	£264,382	£1,288,088	215	21%	£1,230
13001	2087	Nelson Bradley Primary	Primary	£190,123	-£28,057	£162,067	£2,097,687	413	8%	£392
13004	3757	Holy Saviour RC Primary	Primary	£148,551	£41,522	£190,073	£1,181,432	208	16%	£914
13005	3330	Nelson St Philip's CE	Primary	£95,078	£18,464	£113,542	£800,010	140	14%	£811
13006	3331	Nelson St Paul's CE	Primary	£302,235	-£47,776	£254,459	£2,094,339	416	12%	£612
13007	2090	Lomeshaye Junior	Primary	£325,237	£4,360	£329,597	£1,966,923	361	17%	£913
13009	3759	St John Southworth RC	Primary	£107,808	-£17,809	£89,999	£1,199,258	212	8%	£425

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13010	2092	Nelson Walverden Primary	Primary	£384,845	£14,159	£399,004	£2,194,127	448	18%	£891
13011	2093	Nelson Whitefield Infant	Primary	£214,527	£-50,586	£163,941	£1,781,257	325	9%	£504
13012	2089	Marsden Community	Primary	£376,403	£73,547	£449,950	£2,337,700	449	19%	£1,002
13014	3323	Barrowford St Thomas CE	Primary	£71,394	£-14,006	£57,389	£646,103	121	9%	£474
13016	2074	Barrowford	Primary	£143,263	£-37,274	£105,989	£1,986,180	337	5%	£315
13017	3754	Holy Trinity RC Primary	Primary	£102,556	£-1,027	£101,530	£603,336	114	17%	£891
13022	3979	Wheatley Lane Methodist	Primary	£93,378	£8,212	£101,590	£973,949	208	10%	£488
13023	3094	Roughlee CE Primary	Primary	£82,961	£3,869	£86,830	£385,222	52	23%	£1,670
13024	3107	Higham St John's CE	Primary	£62,162	£-14,385	£47,778	£860,240	141	6%	£339
13027	3325	Colne Christ Church CE	Primary	£149,456	£-12,841	£136,616	£943,681	185	14%	£738
13030	2082	Colne Park Primary	Primary	£386,396	£33,448	£419,844	£1,952,990	349	21%	£1,203
13031	2083	Colne Primet Primary	Primary	£99,451	£-51,674	£47,778	£1,118,732	196	4%	£244
13032	3755	Sacred Heart RC. Colne	Primary	£16,731	£12,734	£29,465	£1,092,229	220	3%	£134
13033	2085	West Street Primary	Primary	£189,530	£-3,699	£185,830	£1,267,274	207	15%	£898
13034	2094	Trawden Forest Primary	Primary	£86,402	£38,740	£125,142	£1,006,193	189	12%	£662
13035	3326	St Michael & All Angels	Primary	£136,765	£-33,712	£103,053	£995,836	200	10%	£515
13036	2646	Brierfield Reedley	Primary	£269,503	£-69,176	£200,327	£2,030,510	409	10%	£490
13040	3011	Barnoldswick CE Primary	Primary	£312,060	£-44,648	£267,411	£1,900,105	389	14%	£687
13041	2812	Coates Lane Primary	Primary	£42,627	£50,511	£93,138	£1,049,804	200	9%	£466
13042	2238	Gisburn Road Community	Primary	£-53,593	£20,626	£-32,967	£1,123,761	212	-3%	£-156
13044	3805	St Joseph's Barnoldswick	Primary	£88,211	£-26,046	£62,164	£682,418	126	9%	£493
13046	2214	Kelbrook Primary	Primary	£5,129	£16,637	£21,766	£533,771	98	4%	£222
13048	2240	Salterforth Primary	Primary	£25,318	£6,169	£31,487	£551,698	97	6%	£325
13049	2215	Earby Springfield	Primary	£138,664	£-2,547	£136,117	£1,081,734	153	13%	£890
14001	2109	Britannia Community	Primary	£133,632	£16,249	£149,881	£1,124,416	214	13%	£700
14002	2114	Bacup Thorn Primary	Primary	£272,645	£8,970	£281,615	£1,521,724	294	19%	£958
14003	2111	Northern Primary	Primary	£131,096	£-20,430	£110,667	£973,135	193	11%	£573
14005	2113	Sharneyford Primary	Primary	£67,730	£-7,301	£60,429	£462,524	66	13%	£916
14006	3768	St Joseph's. Stacksteads	Primary	£81,499	£144	£81,644	£964,265	124	8%	£658
14008	2112	Bacup St Saviour's	Primary	£164,807	£-12,295	£152,511	£642,794	103	24%	£1,481
14011	3196	Holy Trinity Stacksteads	Primary	£243,735	£56,315	£300,050	£1,494,775	265	20%	£1,132
14015	3022	Constable Lee CE Primary	Primary	£66,862	£-712	£66,150	£1,500,826	280	4%	£236
14016	3776	St James-The-Less RC	Primary	£157,518	£7,439	£164,957	£958,398	207	17%	£797
14018	3023	St Mary's Rawtenstall CE	Primary	£142,476	£6,907	£149,383	£1,098,049	194	14%	£770
14019	2595	Crawshawbooth Primary	Primary	£241,194	£-28,888	£212,306	£1,416,683	300	15%	£708
14022	2129	Waterfoot Primary	Primary	£150,133	£-20,415	£129,718	£1,657,540	317	8%	£409
14023	3775	St Peter's RC. Newchurch	Primary	£126,339	£-10,450	£115,889	£837,735	152	14%	£762
14024	3113	St Nicholas CE Primary	Primary	£114,676	£11,620	£126,296	£754,113	111	17%	£1,138
14025	3366	St Anne's Edgeside CE	Primary	£95,187	£-25,650	£69,538	£955,168	179	7%	£388
14026	2409	Balladen Community	Primary	£151,680	£19,493	£171,173	£1,088,077	186	16%	£920
14027	2128	Water Primary	Primary	£12,454	£747	£13,201	£793,771	133	2%	£99
14028	3357	Haslingden St James CE	Primary	£106,936	£44,129	£151,065	£1,082,723	192	14%	£787
14029	2117	Haslingden Primary	Primary	£195,630	£-55,317	£140,313	£2,106,182	400	7%	£351
14030	2687	Broadway Primary	Primary	£61,359	£1,933	£63,292	£999,514	209	6%	£303
14031	2118	Helmshore Primary	Primary	£282,741	£46,216	£328,957	£1,921,216	416	17%	£791
14032	3771	St Mary's RC. Haslingden	Primary	£69,768	£12,387	£82,155	£810,475	141	10%	£583
14033	3359	Stonefold St John's CE	Primary	£9,013	£10,323	£19,336	£696,427	117	3%	£165
14034	3615	St Veronica's RC Primary	Primary	£78,917	£26,151	£105,068	£822,151	166	13%	£633
14038	3099	Edenfield CE Primary	Primary	£116,851	£29,409	£146,259	£934,375	195	16%	£750
14039	2121	Stubbins Primary	Primary	£59,596	£-30,604	£28,993	£995,213	202	3%	£144
14040	3058	St Bartholomew's CE Whitworth	Primary	£89,668	£-23,626	£66,042	£917,380	152	7%	£434
14042	2272	Tonacliffe Primary	Primary	£196,630	£63,935	£260,565	£1,607,964	331	16%	£787
14044	3889	Our Lady & St Anselms RC	Primary	£111,498	£-49,355	£62,143	£1,003,381	201	6%	£309
01112	4717	Our Lady's Catholic High Lancaster	Secondary	£550,967	£37,461	£588,428	£6,517,605	1,009	9%	£583
02101	4011	Millfield High	Secondary	£476,983	£322,423	£799,406	£5,472,780	876	15%	£913
02103	5404	Baines School	Secondary	£789,633	£278,392	£1,068,024	£5,415,878	852	20%	£1,254
02104	4628	Saint Aidan's CE	Secondary	£497,118	£130,936	£628,053	£5,219,646	855	12%	£735
02105	4408	Fleetwood High	Secondary	£539,782	£136,547	£676,329	£7,143,567	988	9%	£685
02106	4718	Cardinal Allen Catholic	Secondary	£952,805	£273,673	£1,226,477	£5,436,308	804	23%	£1,525
04114	4137	Lytham St Annes High	Secondary	£965,345	£46,867	£1,012,212	£9,125,098	1,528	11%	£662
04115	4155	Kirkham Carr Hill High	Secondary	£373,114	£80,252	£453,366	£6,086,726	901	7%	£503

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04116	4627	St Bede's Catholic High Lytham	Secondary	£80,970	£49,759	£130,729	£4,794,917	823	3%	£159
06103	4232	Broughton High	Secondary	£963,980	-£174,648	£789,332	£5,736,627	919	14%	£859
06104	4000	Ashton Science College	Secondary	£709,066	£417,697	£1,126,763	£6,022,379	838	19%	£1,345
06105	4410	Moor Park High	Secondary	£677,673	-£179,274	£498,399	£4,696,342	618	11%	£806
06112	5405	Archbishop Temple CE	Secondary	£409,710	-£899	£408,811	£4,884,212	791	8%	£517
06115	4168	Longridge High	Secondary	£671,092	-£181,108	£489,984	£4,921,575	804	10%	£609
06116	4721	St Cecilia's RC High	Secondary	-£446,790	£465,603	£18,813	£3,103,513	506	1%	£37
06117	4610	Christ The King Catholic	Secondary	£323,278	£72,744	£396,022	£3,003,474	382	13%	£1,037
06118	4606	Our Lady's Catholic High Preston	Secondary	£496,986	£183,267	£680,253	£5,594,554	902	12%	£754
06121	4609	Corpus Christi College	Secondary	£18,641	£235,277	£253,918	£5,018,901	752	5%	£338
06122	4001	Preston Muslim Girls'	Secondary	£858,104	£154,872	£1,012,976	£3,537,534	562	29%	£1,802
07101	4500	Balshaws CE High	Secondary	£782,578	£234,148	£1,016,725	£5,416,745	927	19%	£1,097
07102	5407	St Marys RC Tech College	Secondary	£216,190	£268,955	£485,145	£4,711,795	778	10%	£624
07104	4036	Wellfield B&E College	Secondary	-£697,239	£23,680	-£673,559	£2,294,828	332	-29%	-£2,029
07105	4623	Brownedge St Mary's High	Secondary	£658,040	£244,839	£902,879	£4,730,653	764	19%	£1,182
07106	4741	All Hallows High	Secondary	£491,019	£6,378	£497,397	£5,404,876	896	9%	£555
07107	4150	Walton-Le-Dale High	Secondary	£590,637	£221,057	£811,694	£5,126,882	778	16%	£1,043
07109	4685	Hutton CE Grammar	Secondary	£168,212	£90,406	£258,618	£5,051,704	878	5%	£295
07111	4332	Penwortham Girls' High	Secondary	£353,468	£30,611	£384,079	£4,732,004	786	8%	£489
08103	4631	St Bede's Catholic High Ormskirk	Secondary	£462,289	£15,085	£477,374	£4,448,726	715	11%	£668
08105	4173	Up Holland High	Secondary	£367,488	£32,516	£400,004	£5,303,384	842	8%	£475
08113	4411	Lathom High	Secondary	£269,237	£8,691	£277,928	£4,238,817	603	7%	£461
08114	4621	Our Lady Queen Of Peace	Secondary	£423,202	£23,864	£447,066	£5,892,318	900	8%	£497
08115	4412	Ormskirk School	Secondary	£764,426	-£347,432	£416,993	£8,744,600	1,325	5%	£315
09103	4742	Holy Cross Catholic High	Secondary	£871,048	-£10,265	£860,783	£5,624,928	979	15%	£879
11103	4797	Mount Carmel RC High	Secondary	£532,075	-£115,925	£416,150	£5,488,707	789	8%	£527
11105	4026	Rhyddings High	Secondary	£675,009	£33,593	£708,602	£3,943,333	564	18%	£1,256
11109	4725	St Augustine's RC High	Secondary	£270,212	£193,603	£463,816	£6,518,620	1,098	7%	£422
11113	4013	Ribblesdale High	Secondary	£1,151,568	£112,544	£1,264,112	£8,248,731	1,374	15%	£920
12110	4801	Shuttleworth College	Secondary	-£54,677	£919,711	£865,034	£8,347,063	1,107	10%	£781
12112	4806	Unity College	Secondary	£1,018,201	£474,055	£1,492,256	£9,143,318	1,304	16%	£1,144
12113	4803	Sir John Thursby College	Secondary	£1,085,127	£300,333	£1,385,460	£9,034,861	1,125	15%	£1,232
13108	4624	SS J Fisher/T More RC	Secondary	£293,179	-£58,903	£234,276	£4,950,692	782	5%	£300
13111	4799	Pendle Vale	Secondary	£1,212,197	£488,120	£1,700,317	£8,156,736	1,071	21%	£1,588
14101	4030	Alder Grange Tech School	Secondary	£307,066	£15,722	£322,788	£5,272,720	846	6%	£382
14107	4184	Whitworth Community High	Secondary	£446,896	£26,597	£473,493	£4,137,583	647	11%	£732
14109	4402	Haslingden High	Secondary	£495,145	£319,340	£814,485	£9,812,375	1,586	8%	£514
01141	1100	Stepping Stones	Short Stay	£56,364	£43,040	£99,404	£879,721	30	11%	£3,313
01149	1121	Chadwick Centre	Short Stay	£187,398	-£120,067	£67,331	£1,341,690	72	5%	£935
02143	1117	McKee Centre	Short Stay	£252,227	£143,073	£395,301	£2,126,369	92	19%	£4,297
06141	1109	Larches House	Short Stay	£300,397	-£52,584	£247,813	£2,042,109	78	12%	£3,177
07141	1103	Golden Hill	Short Stay	£118,505	-£10,274	£108,231	£1,049,497	26	10%	£4,163
08147	1118	The Acorns	Short Stay	£206,314	£33,138	£239,452	£1,348,710	51	18%	£4,695
09145	1116	Shaftesbury House	Short Stay	£225,444	-£138,887	£86,557	£2,181,176	101	4%	£857
11142	1113	Oswaldtwistle School	Short Stay	£358,204	£125,048	£483,252	£1,609,853	69	30%	£7,004
00131	7028	Wennington Hall	Special	-£1,775,325	-£733,737	-£2,509,062	£1,499,223	16	-167%	-£156,816
00133	7007	Bleasdale House	Special	£253,305	£379,729	£633,034	£2,268,929	35	28%	£18,087
00134	7110	Royal Cross Primary	Special	£131,374	£61,722	£193,096	£834,000	25	23%	£7,724
00139	7109	Longridge Hillside	Special	-£16,416	£44,265	£27,849	£2,977,800	100	1%	£278
01130	7034	Morecambe Road	Special	£385,331	£5,982	£391,313	£3,131,515	167	12%	£2,343
01131	7097	The Loyne School	Special	£384,206	£101,853	£486,059	£3,072,372	115	16%	£4,227
02130	7040	Great Arley	Special	£128,464	-£3,686	£124,778	£2,176,525	119	6%	£1,049
02131	7100	Brookfield	Special	-£747,547	£153,886	-£593,661	£2,422,872	69	-25%	-£8,604
02132	7102	Red Marsh	Special	£298,105	£90,135	£388,240	£2,035,699	93	19%	£4,175
04133	7076	Kirkham Pear Tree	Special	£289,540	£12,482	£302,021	£2,858,239	102	11%	£2,961
06131	7014	Moorbrook	Special	£29,809	£80,273	£110,082	£1,423,725	50	8%	£2,202
06134	7119	Acorns	Special	£199,499	£130,714	£330,212	£1,911,092	86	17%	£3,840
06135	7118	Sir Tom Finney	Special	£433,261	£180,770	£614,030	£3,703,082	183	17%	£3,355
07130	7049	Lostock Hall Moor Hey	Special	£586,216	-£17,416	£568,800	£2,541,939	133	22%	£4,277
07131	7098	The Coppice School	Special	£211,007	£11,240	£222,247	£1,811,268	65	12%	£3,419
08135	7104	Hope High School	Special	£418,064	£104,045	£522,109	£2,209,842	90	24%	£5,801

Sch no	DFE No	Sch name	Phase	Revenue open balance 1/04/21	Revenue in year movement 21/22	Revenue close balance 31/03/22	Revenue cfr income	NOR	Balance as % of CFR income	Balance per pupil
08136	7117	Kingsbury Primary	Special	£280,004	£160,326	£440,330	£2,258,418	82	19%	£5,370
08137	7116	West Lancs Comm High	Special	£252,149	£62,134	£314,283	£2,746,731	122	11%	£2,576
08138	7120	Elm Tree	Special	£335,090	£172,556	£507,646	£4,237,883	129	12%	£3,935
09130	7037	Chorley Astley Park	Special	£792,861	-£227,541	£565,320	£3,447,356	167	16%	£3,385
09131	7089	Mayfield School	Special	£364,097	£282,246	£646,343	£2,843,957	126	23%	£5,130
11130	7099	Oswaldtwistle White Ash	Special	£501,584	£59,618	£561,202	£2,513,848	113	22%	£4,966
11131	7060	Broadfield Special Sen	Special	-£86,097	£183,193	£97,096	£3,402,568	170	3%	£571
12134	7111	The Rose School	Special	-£260,806	£137,890	-£122,916	£2,211,162	67	-6%	-£1,835
12135	7114	Holly Grove	Special	£289,445	£2,786	£292,231	£2,636,583	118	11%	£2,477
12136	7113	Ridgewood	Special	£374,645	£171,357	£546,002	£3,880,056	164	14%	£3,329
13133	7112	Pendle View	Special	£535,958	£268,897	£804,856	£3,035,191	125	27%	£6,439
13134	7115	Pendle Community High	Special	£755,080	£36,699	£791,779	£3,382,433	159	23%	£4,980
14132	7044	Cribden House Community	Special	£326,319	-£41,079	£285,241	£2,009,295	90	14%	£3,169
01008	3705	St Josephs. Lancaster	Primary	£78,900	-£67,935	£10,965	£516,661	Academised during 2021/22		
06030	3636	Preston St Matthews CE	Primary	£243,733	-£65,530	£178,203	£1,937,744	Academised during 2021/22		
11004	2096	Accr'Ton Huncoat Primary	Primary	£211,580	-£33,950	£177,630	£1,042,080	Academised during 2021/22		
11102	4195	The Hollins High	Secondary	£542,414	-£8,657	£533,757	£5,192,128	Academised during 2021/22		
11024	2108	Oswaldtwistle West End	Primary	£25,010	-£18,984	£6,026	£910,361	Academised during 2021/22		
14045	3811	St John With St Michael	Primary	-£200	£45,002	£44,802	£582,488	Academised during 2021/22		

Annual Report 2021/22 April 2021 - March 2022

Introduction

The 2021/22 financial year again brought considerable challenges for schools and their staff, governors, and children, as we all faced the considerable uncertainty of the ongoing COVID-19 pandemic and the year ended with the added difficulties surrounding increased inflationary pressures on budgets.

For the Schools Forum, the business of the full Forum and its working groups had again to be conducted virtually and this annual report sets out some of the key issues dealt with by the Forum in FY 2021/22.

Chair of the Forum

Shaun Jukes, Headteacher at Sir Tom Finney High School, remained the Forum Chair for 2021/22, with Stephen Booth, a governor at Ellel St John the Evangelist CE Primary School, the Vice-Chair.

School Budgets 2022/23

Advising on the Schools Budget is a crucial responsibility of the Forum. The key headlines from the 2022/23 budget setting process included:

Lancashire's Gross 2022/23 Dedicated Schools Grant (DSG) allocation is £1,115.737m. The 2022/23 figure is over £42m higher than the previous year. This growth in funding is due to increased education funding nationally and an overall rise in pupil numbers compared to 2021/22.

Schools Block

Lancashire continues to use the National Funding Formula (NFF) methodology to calculate Schools Block budgets in 2022/23.

Allocations for Lancashire schools and academies from April 2022 included our share of the additional Dedicated Schools Grant (DSG) funding announced by the Government, which equated to £2.3b nationally in 2022/23. The main changes to NFF formula factors arising from this additional funding are set out below:

National Funding Formula factor values for 2022/23 have increased, as follows:

- 3% to basic entitlement, Free School Meals Ever 6, income deprivation affecting children index, lower prior attainment, English as an additional language and the lump sum;
- 2% to the funding floor, the minimum per pupil levels and free school meals,

- 0% on the premises factors, except for Private Finance Initiative which has increased by the Retail Price Index.

The announcements also included the relevant minimum pupil funding levels for primary and secondary schools, which incorporate the 2% uplift for 2022/23:

- For primary schools, the minimum pupil funding level will be £4,265 per pupil in 2022/23.
- For secondary schools, the minimum pupil funding level will be £5,525 per pupil from 2022/23.

Following a government consultation on the Sparsity factor held in 2021, the DfE amended the factor from April 2022, including increased maximum sparsity values, updated sparsity distance calculations so that they are now based on road distances, instead of straight-line distances, and the introduction of a sparsity distance taper, in addition to the existing year group size taper.

Following a consultation with schools and academies in Lancashire, areas where local discretion is available in 2022/23 were agreed by the Schools Forum and the LCC Cabinet as follows:

- The Minimum Funding Guarantee (MFG) was set at a +2.0%
- The transfer of £1.7m (0.19%) to enable the required school contribution towards the Private Finance Initiative (PFI) contract to be met from the relevant funding block in 2022/23.

High Needs Block (HNB)

The extra funding made available for high needs funding from April 2022 allowed the following increases in expenditure to be agreed:

- To cover the forecast cost and demand led pressures in High Needs expenditure from April 2022;
- To support increases in HNB expenditure to broadly match or exceed uplifts in the mainstream sector, including:
 - increasing the Weighted Pupil Numbers (WPN) rate across all school and FE settings by 4% to £4,567;
 - increasing 'School Specific' allocations in special schools and PRUs by 2%; to match the Minimum Funding Guarantee (MFG) applicable in mainstream.

Early Years Block (EYB)

Government announcements for 2022/23 indicated that an extra £170m was made available in 2022/23 for the Early Years Block nationally. Lancashire's share of this funding, together with a circa £1m contribution from Schools Forum reserves, enabled increases to be made across all early years funding areas, as explained below.

3 and 4-year-old entitlements

In 2020/21 and 2021/22 the Schools Forum agreed to transfer £2m each year from the Schools Block to the Early Years Block, to help with the pressures being faced by the sector. This meant that an additional £0.08 per hour had been added to the 3 and 4 year old base rate for these years. Unfortunately, Schools Block budget pressures in 2022/23 meant that this transfer was not possible from April 2022 and the £0.08 per hour needed to be removed

from the base rate for 2022/23. The Schools Forum was aware that the early years sector was already facing considerable cost pressures, so agreed that circa £1m of Schools Budget reserves be used in 2022/23 to help reduce the turbulence in the system caused by this reduction. The circa £1m contribution allowed £0.04 per hour to be added back to the base rate and will be available for 2022/23 only.

The 2022/23 funding rate was therefore calculated as follows:

2021/22 base rate, which included £0.08 contribution from Lancashire Schools Block	£4.35 per hour
2022/23 adjusted base rate without £0.08 contribution	£4.27 per hour
2022/23 base rate with DfE £0.17 uplift	£4.44 per hour
2022/23 base rate with £0.04 one off contribution from Schools Forum reserves	£4.48 per hour

The Lancashire base rate for 3 and 4-year-old entitlements was £4.48 per hour in 2022/23, an increase of 13p per hour from 2021/22.

Supplementary funding hourly rate for maintained nursery schools

Lancashire received a £0.17 increase in the supplementary funding hourly rate for maintained nursery schools in 2022/23, which was passed to the maintained nursery schools providing £3.67 per hour from April 2022 for eligible universal 3 and 4-year-old hours.

2-year-old entitlement

Lancashire received an additional £0.21 per hour for the 2-year-old entitlement for 2022/23, which was passed to providers in full, providing a funding rate for 2 year olds of £5.37 per hour from April 2022.

Early Years Pupil Premium

Lancashire increased our early years pupil premium rate by 7p to 60p per hour, equivalent to up to £342 per eligible child per year, for 2022/23, in line with national announcements.

Disability Access Fund

Lancashire increased the disability access fund by £185 to £800 per eligible child per year for 2022/23, in line with national announcements.

Central School Services Block (CSSB)

This Block is to fund central functions that local authorities carry out on behalf of pupils in state-funded maintained schools and academies in England. The Central School Services Block (CSSB) is split into funding for historic commitments and funding for ongoing responsibilities.

In order to protect some combined budget contributions that help support valued services to schools, the Schools Forum agreed to transfer £0.350m historic commitments into the High Needs Block, so funding can continue to be provided for MASH and Emotional Health and Wellbeing Service, as the DfE have cut the 'historic commitments' element of the CSSB.

Issuing Individual Schools Budgets (ISBs)

Once Lancashire's proposals had been approved by the DfE, individual school budgets for 2022/23 were issued to schools on 21 February 2022.

Supplementary Funding 2022/23

In response to the increasing cost pressures facing schools, including the Health and Social Care Levy, which was applied initially through increased national insurance contributions from employers from April 2022, the Chancellor made a further £1.6bn of funding available for schools and high needs, for the 2022/23 financial year, above the previous Dedicated Schools Grant settlement.

For mainstream schools, the DfE allocated this funding through a schools supplementary grant 2022/23, where the funding rates were determined nationally.

For High Needs, Lancashire was allocated supplementary grant funding and the local distribution methodology was agreed by the Forum. For 2022/23 the grant allocation was split into 2 parts:

- *Health and Social Care Levy (Increased NI contribution in 2022/23 for social care)*
For special schools and AP only
Calculated on 80% of total budget per school x 1.25% based on 2022/23 School Budget data, with an adjustment for exceptional place changes in year at special schools and increased exclusions at AP later in the year
- *Wider costs pressures*
Paid across all sectors and calculated on basis of WPNs in 2022/23 School Budget data, estimated at circa £600 per WPN

It is anticipated that supplementary grant allocations will be incorporated into the Dedicated Schools Grant from 2023/24.

Service De-delegations 2022/23

Regulations require that the Forum is responsible for deciding which services should be de-delegated each year. In October 2021, the Forum considered a number of de-delegation proposals. Primary and secondary members agreed by phase that a number of services would be de-delegated for the 2022/23 financial year. This means that for primary and secondary schools (but not academies) services will be provided centrally. A full list of de-delegations agreed from April 2022 are:

- **Staff costs – Public Duties/Suspensions.** This de-delegation incorporates reimbursement to schools for staff costs associated with public duties and suspensions;
- **Heritage Learning Service - Primary Schools Only.** Provides funding for the work the Heritage Learning Service undertakes for primary schools to help meet the national curriculum and to support wider cultural learning;
- **Support for Schools in Financial Difficulty.** This funding allows support to be offered to schools in financial difficulty, which is managed by the School Improvement Challenge Board (SICB) against published eligibility criteria.
- **Primary Inclusion Hubs.** This de-delegation continues to support Inclusion activities of primary schools in each district to reduce exclusions and improve attendance for pupils at risk of exclusion, including providing high quality training for staff in schools and sharing share good practice and expertise.

Consultation Responses

As always, the Forum is very grateful for the consultation responses and comments from colleagues in schools and academies that help to shape and steer the Forum's decisions and recommendations. 144 responses were received from schools in response to consultations about the school funding arrangements for 2022/23.

Support for Schools in Financial Difficulty (SIFD)

21 schools ended the 2021/22 financial year in deficit, compared to 30 schools a year earlier. A number of schools returned to surplus during the year through the delivery of budget recovery plans. The additional funding in the schools system did assist this improved position and the final outturn position against schools delegated budgets at 31 March 2022 was an underspend of £5.173m. This means that school balances increased by £5.173 in 2021/22 to a total of £95.325m.

The Forum continues to work with the LA to support schools that are in, or may be heading towards, financial difficulty. This includes monitoring the financial outlook of schools on the Schools in Financial Difficulty category warning system for maintained schools, issuing early warning letters to offer a 'heads-up' that financial pressures may be mounting and using the agreed SIFD procedures to provide additional support to some schools. During the year, the Forum agreed an amendment to the SIFD support criteria to allow interest charges and provision of school finance support will be met centrally from SIFD funding for schools with an agreed recovery plan, or an agreed sustainability plan.

During 2021/22, the Forum also agreed a one-off SIFD allocation to a Lancashire school, to assist with the financial recovery plan.

Clawback of Excess balances

The Lancashire clawback of excessive revenue balances policy was suspended at March 2021 due to COVID-19 uncertainties. In recognition of the continued funding uncertainties caused by the pandemic, the Forum again agreed to suspend the application of clawback at 31 March 2022.

Whilst clawback will not be applied in 2021/22, it is the Forum's intention is to resume the School Balances and Clawback arrangements for March 2023, subject to consideration of the 2021/22 outturn position.

Full details of all Schools Forum business are available from the [Schools Forum website](#).

For any queries, please email schoolsforum@lancashire.gov.uk

Implementing the Direct National Funding Formula Government consultation

Launch date **7 June 2022**
Respond by **9 September 2022**

Draft Lancashire Schools Forum Response

Question 1

Do you agree that local authorities' applications for transfers from mainstream schools to local education budgets should identify their preferred form of adjustment to NFF allocations, from a standard short menu of options?

Yes, this seems like a sensible approach to managing transfer requests after the introduction of the direct NFF , providing a simple and consistent framework.

Do you have any other comments on the proposals for the operation of transfers of funding from mainstream schools to high needs?

Our biggest concern with this is that the mechanism is only referring to transfers of funding from mainstream schools to high needs. In Lancashire, our most recent transfers have been from school block to early years block, as the early years sector has been facing the most significant financial challenges. Whilst we recognise that the most significant DSG deficits nationally are related to high needs pressures, we would urge DfE to retain the options available in the current framework that facilitates transfers to early years block, in addition to high needs block.

Question 2

Do you agree that the direct NFF should include an indicative SEND budget, set nationally rather than locally?

Yes, we would welcome national standards for notional SEND budgets to aid consistency across the country. Our main concern about such a system is about how this may put additional pressure on the local HNB budget if changes provide a more generous system than we currently operate, and we would urge DfE to ensure that any national system that is introduced is accompanied by relevant transitional protections.

Question 3

Do you have any comments on the proposals to place further requirements on how local authorities can operate their growth and falling rolls funding?

In general, some basic requirements to assist in national standardisation and transparency are welcomed, especially given the proposals seems to allow for a degree of continued local flexibility. From the initial proposals, our local growth fund arrangements would appear compatible with the examples provided. Again, our biggest concern is around the affordability of some existing commitments with schools, that could have up to 7 years to run, if the calculation methodology reduces the amount of funding available to us. Any final proposals that are implemented must allow adequate transitional protections to allow LAs to honour existing commitments funded under growth and falling rolls funding. Allowing unspent funding to continue to revert to local DSG balances may be one way provide some protection going forward.

Question 4

Do you believe that the restriction that falling rolls funding can only be provided to schools judged “Good” or “Outstanding” by Ofsted should be removed?

Whilst we understand the rationale of the current restriction that falling rolls funding can only be provided to schools judged “Good” or “Outstanding” by Ofsted, we would support the removal of such a restriction. It is clearly beneficial that all schools are providing good and outstanding education to pupils, but if places are needed, the use of the falling rolls fund to support the availability of places that will be needed in the near future, regardless of their Ofsted judgement, seems reasonable. Falling rolls funding at schools not judged good or outstanding could assist schools alongside other strategies to support their educational improvement.

Question 5

Do you have any comments on how we propose to allocate growth and falling rolls funding to local authorities?

Re-baselining the total amount of growth funding and allocating funding to LAs on the basis of both growth and falling rolls by calculating allocation on the basis of MSOAs which have either seen growth or significant declines in pupil numbers seems sensible and we would support this, subject to our early comments about ensuring that LAs can honour existing commitments. We would also urge DfE to keep the level of funding under review to ensure that adequate resources are being delivered through this mechanism to enable LAs to properly support expansion costs at schools and academies that are meeting basic need demand now or in the future.

Question 6

Do you agree that we should explicitly expand the use of growth and falling rolls funding to supporting local authorities in repurposing and removing space?

We would favour the extension of the growth and falling rolls funding so that it could be used to support LAs for the revenue costs associated with repurposing or reducing school places, especially as the number of pupils begins to decline in future years. Again, our primary concern is that adequate funding is provided to the LA to ensure that existing commitments can be honoured, and new requirements can be met.

Question 7

Do you agree that the Government should favour a local, flexible approach over the national, standardised system for allocating growth and falling rolls funding; and that we should implement the changes for 2024-25?

Yes, we agree that the best option to allocating growth funding is the one with a local, flexible approach, especially given LAs sufficiency duty. Implementing changes from 2024/25 does not seem unreasonable, so long as existing commitments can be honoured, and sufficient funding levels are available to ensure LAs can meet their statutory duties.

Question 8

Do you have any comments on the proposed approach to popular growth?

We would welcome the implementation of a change that would enable maintained schools to apply for 'popular growth'. A system that provides equitable arrangements across maintained schools and academies seems to be in keeping with the principles of a direct NFF.

Question 9

Do you agree we should allocate split site funding on the basis of both a schools' 'basic eligibility' and 'distance eligibility'?

Yes, this seems like a sensible approach and is similar to the arrangements adopted in Lancashire.

Question 10

Do you agree with our proposed criteria for split site 'basic eligibility'?

Yes, where school sites are separated by road/railway there are additional operational costs, and we would support this as a methodology to determine basic split site eligibility. We also support the qualifying and exclusions criteria set out in the consultation.

Question 11

Do you agree with our proposed split site distance criterion of 500m?

No, we do support a distance component to split site arrangements and although arguments can be made for a range of distances, we have opted for a 300m threshold in Lancashire, as this was judged to be a distance above which more significant additional costs were incurred. We would commend the 300m distance to you. We also acknowledge the cliff edge nature of any distance threshold without a taper, but when considering split site arrangements locally we came down on the side of simplicity and would support this in the national arrangements, whatever distance is ultimately implemented.

Question 12

Do you agree with total available split sites funding being 60% of the NFF lump sum factor?

Yes, in Lancashire our current arrangements use a % of the lump sum to calculate split site allocations and we welcome this approach nationally. Our local percentage is not as high as the proposed NFF methodology, but we are sure schools with split sites would welcome the increased allocation to help them meet the additional costs of operating on more than one site.

Question 13

Do you agree that distance eligibility should be funded at twice the rate of basic eligibility?

Yes, we currently use differencing levels of split site allocation dependent on the level of eligibility and the DfE proposals seem sensible.

. Question 14

Do you agree with our proposed approach to data collection on split sites?

Yes, there does not seem to be any existing mechanism that would allow DfE to calculate this factor nationally from existing data, so we would support the proposed approach.

Question 15

Do you have any comments on our proposed approach to split sites funding?

As with many areas in this consultation, a key factor will be the transition to the new national

arrangements from the previous local formula, and we welcome the use of the MFG to protect schools losing funding on the introduction of the NFF methodology.

Question 16

Do you agree with our proposed approach to the exceptional circumstances factor?

No.

Question 17

Do you have any comments on the proposed approach to exceptional circumstances?

Whilst we are largely supportive of the approach set out, we are concerned about the movement in threshold from 1% of budget to 2.5%. We are concerned that the introduction of such a change in threshold could disadvantage schools reliant on the exceptional circumstances factor. Though amounts are likely to be low, this may impact on schools at a time when the other costs pressure are rising significantly. We would welcome an approach that retained the 1% of budget threshold.

Question 18

Do you agree that we should use local formulae baselines (actual GAG allocations, for academies) for the minimum funding guarantee (MFG) in the year that we transition to the direct NFF?

Yes, as specified in the consultation, it is most important that schools receive protection against their actual previous years allocation rather than any notional allocation.

Question 19

Do you agree that we should move to using a simplified pupil-led funding protection for the MFG under the direct NFF?

Yes, in principle we agree that a simplified pupil-led funding protection for the MFG is the correct approach, aiding simplicity and transparency. We note that the transition before full implementation of the direct NFF will allow protection around split site and exceptional circumstances changes and would seek clarification that the existing MFG protection would be classed as pupil led-funding once the direct NFF MFG methodology is implemented. We would also ask DfE to consider the implications of the sparsity calculation on the MFG, as it appears that this funding is more likely to fluctuate overtime as the characteristics of pupils attending a school change, but it does not appear that schools would be offered any protection against this under the proposed arrangements as the factor is classed as school-led.

Question 20

Do you have any comments on our proposals for the operation of the minimum funding guarantee under the direct NFF?

We support the proposals set out in the consultation document to make adjustments to the baselines such that schools that change their year-group structures will not be unfairly "overprotected" compared to other schools under the direct NFF.

Question 21

What do you think would be most useful for schools to plan their budgets before they

receive confirmation of their final allocations: (i) notional allocations, or (ii) a calculator tool?
We would favour the option to make a calculator tool available. This will allow schools to use their own data to generate a forecast budget, which is much more likely to be understood by schools as they are interacting with the process. Our concern about notional allocations is that they can be taken as a definitive budget for planning purposes, leading to schools incorrectly making decisions on a level of funding that may have a material change.

Question 22

Do you have any comments on our proposals for the funding cycle in the direct NFF, including how we could provide early information to schools to help their budget?

The proposed funding cycle seems reasonable and fits with the amended arrangements following the implementation of the direct NFF.

Question 23

Do you have any comments on the two options presented for data collections in regards to school reorganisations and pupil numbers? When would this information be available to local authorities to submit to DfE?

Of the options presented in the consultation we would prefer the use of a pre-populated to be issued in December. We acknowledge there would be a short turn around for the school reorganisations and changes in pupil numbers information, but believe that this should be achievable, and will be easier to facilitate with October data pre-populated.

Question 24

Regarding de-delegation, would you prefer the Department to undertake one single data collection in March covering all local authorities, or several smaller bespoke data collections for mid-year converters?

Of the options available, Lancashire would support Option 1 for a single collection of de-delegation information.

Question 25

Do you have any other comments on our proposals regarding the timing and nature of data collections to be carried out under a direct NFF?

The maximisation of return dates within the constraints available would be greatly appreciated.

LANCASHIRE SCHOOLS FORUM
Date of meeting 5 July 2022

Item No 8

Title: Recommendations of the High Needs Block Working Group

Appendix A refers

Executive Summary

On 14 June 2022, the High Needs Block Working Group considered a number of reports, including:

- 2021/22 Schools Budget Outturn Report;
- School Balances and Clawback 2021/22;
- Schools Forum Annual Report 2021/22;
- Schools Supplementary Grant 2022 to 2023;
- SEND Review Green Paper: Right Support, Right Place, Right Time;
- HNB Commissioned Place Process 2023/24.

A summary of the information presented, and the Working Group's recommendations are provided in this report.

Recommendations

The Forum is asked to:

- a) Note the report from the High Needs Block Working Group held on 14 June 2022;**
- b) Ratify the Working Group's recommendations.**

Background

On 14 June 2022, the High Needs Block Working Group considered a number of reports. A summary of the information presented, and the Working Group's recommendations are provided below:

1. 2021/22 Schools Budget Outturn Report

This report provided the Working Groups with details of the 2021/22 Schools Budget final financial outturn position, in relation to each funding block. A copy of the full report presented to the working group is provided as an appendix to the Schools Block summary report.

The Overall Schools Budget outturn position for 2021/22 showed an underspend of circa £8.4m.

Further details were provided in connection with each funding block and members concentrated on the High Needs Block position. It was noted that the outturn position for the 2021/22 High Needs Block (HNB) revealed a circa £6.5m underspend. Some key highlights included:

Maintained Schools

Actual costs on all elements of maintained schools HNB expenditure, including mainstream schools, special schools and PRUs were above the budgeted figure. The most significant variance related to mainstream schools and represented a circa 33% growth in funding compared to the budget. Special Schools grew by over 5% and Alternative Provision by 11%.

Further Education - Post 16

The Further Education - Post 16 budget had a growth of £1.3m or circa 19%.

Commissioned Services

The commissioned services expenditure ended the year with an overspend of over £2.1m. As per established practice, a more detailed breakdown of the HNB expenditure against the agreed budget lines was provided. Of particular interest to the Forum on the commissioned services breakdown was the £3.2m overspend on the Out-county budget. This overspend figure is reduced from 2020/21 and strategies are being deployed to enhance maintained provision within the county, through the AP Strategy, SEN Units and increased special school capacity, but this will take time to feed through into the budget position.

High Needs Growth

When the 2021/22 Schools Budget was being set, provision was made for HNB growth, which was forecast at circa £18m for the year. This provision was utilised in year to offset the increased expenditure of circa £12m across HNB school budget lines and within commissioned services, allowing the overall HNB budget to end the year with a circa £6.5m surplus.

It was noted that the level of in year HNB growth has been running at very roughly £10m+ (circa 10% of HNB budget) for a number of years and the budget has only managed to generate a surplus in 2021/22 thanks to significant increases in the level of DSG HNB allocation. The levels of DSG increases are expected to reduce in future years (early indications are 5% in 2023/24, then 3% subsequently), which are likely to again place considerable pressure on high needs funding and reserves.

Members queried some key issues impacting on the HNB budget, including the closure of Wennington Hall school, and welcomed the progress being made in the developments of SEN units in mainstream schools. It was also noted that the number of EHCPs in Lancashire was now in line with the national average, and had been so for a number of years, after historically being higher.

The Working Group:

- a) **Noted the report and the 2021/22 Schools Budget final financial outturn position.**

2. School Balances and Clawback 2021/22

This report set out the year end position of schools' delegated budgets at 31 March 2022. A copy of the full report presented to the working group is provided as an appendix to the Schools Block summary report.

The final outturn position against schools delegated budgets at 31 March 2022 was an underspend of £5.173m. This meant that school balances had increased by £5.173m in 2021/22, to a total of £95.325m.

Further details were provided and members concentrated on the High Needs Block schools. Some key highlights included:

- Aggregate balances had increased in both special schools and PRU during 2021/22;
- 3 special schools ended the year with deficit budgets;
- In total 21 schools were in deficit at March 2022, the lowest number since March 2015.

It was noted that the year end position did include grant funding from DfE that was allocated on an academic year basis and analysis provided by schools about their year end position at 31 March 2022 indicated that circa £28m of total balances are classed as 'committed'.

School Balances and Clawback Policy 2022/23

Whilst clawback has been suspended on year end balances at March 2020, 2021 and 2022, the guideline balance policy remained unchanged, as follows:

- 12% of Consistent Financial Reporting (CFR) income for all phases of maintained school
- A £60,000 minimum balance threshold will be applied.

The group were asked to consider the school balances and clawback policy to be applied at 31 March 2023. A number of schools balances and clawback options are available to the Forum for 2022/23, which included:

- a) Reintroduce a clawback policy in 2022/23, as per previous arrangements set out below, or with amended rates:
 - A clawback rate of 50% is to be applied to any balance above guideline in the first year a school exceeds the guideline (after adjusting for exemptions)
 - A clawback rate of 100% is to be applied to any balance in excess of guideline where the guideline has been breached for two or more consecutive years (after adjusting for exemptions)

(Note: As clawback was suspended in 2021/22, no school would be subject to the 100% clawback rate in 2022/23).

- b) Suspend the application of clawback at March 2023 due to the continued uncertainties around school funding , including the significant Covid catch up funding in the system that operates on an academic year basis, and due to the substantial cost pressures facing schools over the coming months and years, with inflation at a 40 year high and rising;
- c) Other suggestions that members may have e.g., Raising the threshold percentage from the current 12%.

Clawback Exemption Request 2022/23

Members also considered an exemption from clawback for a Lancashire secondary school that has been saving funding towards a sports hall. .

Schools Budget Reserves 2021/22

The 31 March 2022 position on Schools Budget Reserves was also considered, and it was noted that the total of all schools reserves was £126.872m, an increase of circa £16m.

Members considered questions posed around the School Teaching and Support Staff Supply Reimbursement Scheme reserve, which ended the year with an underspend of circa £0.4m, leaving an outturn position of circa £2.3m. The overall in year position includes a surplus on the teacher scheme of just under £0.6m, which was offset by a circa £0.2m deficit on the support staff scheme.

The Forum had previously agreed that any year end balance above £1.25m should be redistributed to scheme members. The working group considered if £1.25m remained an appropriate maximum level for the reserve or if it should increase to say £1.5m.

Members discussed key issues highlighted in the report and made a number of recommendations.

A nursery school representative indicated that the plans of some maintained nursery schools to utilise spare space within their establishments in order to generate additional income had been put on hold following contact from Asset Management colleagues. Officers agreed to investigate this further.

The Working Group:

- a) **Noted the report;**
- b) **Noted the overall position on school balances at 31 March 2022, including the individual school level information provided in the report;**
- c) **Recommended that clawback of revenue balances above the guideline figure should be reinstated at 31 March 2023, at previous levels:**
 - **A clawback rate of 50% is to be applied to any balance above guideline in the first year a school exceeds the guideline (after adjusting for exemptions);**

- A clawback rate of 100% is to be applied to any balance in excess of guideline where the guideline has been breached for two or more consecutive years (after adjusting for exemptions);
(Note: As clawback was suspended in 2021/22, no school would be subject to the 100% clawback rate in 2022/23).
- d) Recommended that the minimum balance threshold of £60,000 be increased, to offer greater protection for small schools;
- e) Supported a clawback exemption applying to a Lancashire secondary school saving towards a sports hall project;
- f) Noted the underspend on the supply scheme budget at 31 March 2022 and recommended that the level of scheme reserve be increased to £1.5m and any funding in excess of this at March 2022 be reimbursed to scheme members, on the basis of contribution levels to the teaching staff scheme only;
- g) Requested that officers investigate the reasons for nursery schools plans to utilise spare space within their establishments in order to generate additional income being put on hold.

In connection with recommendation d) above, officers are recommending that the minimum balance threshold be increased to £75,000 for 2022/23, which will rebase the value to a level broadly equivalent to that when the threshold was last increased.

3. Schools Forum Annual Report 2021/22

Each year the Schools Forum publishes an annual report setting out items of business in which the Forum has been involved

A draft report for 2021/2022 was presented for consideration, and the HNB issues were highlighted.

The Working Group:

- a) Noted the report;
- b) Recommend to the Schools Forum that the 2021/22 Annual Report be approved for publication, subject to the correction of a typographical error on page 5.

A copy of the updated version of the 2021/22 Annual Report is provided as an appendix to the Schools Block summary support.

4. Schools Supplementary Grant 2022 to 2023

Previous reports to the working groups and to Schools Forum have provided information on the Schools Supplementary Grant.

Following discussions at the last working group, the Schools Forum agreed some final adjustments to the Lancashire High Needs Supplementary Grant allocation methodology, which will be calculated in two parts:

- Health and Social Care Levy (Increased NI contribution in 2022/23 for social care)
- Wider Cost Pressures

Subsequent to the March 2022 Forum meeting, the DfE have confirmed that local authorities and academies will receive their payments for 2022/23 in two tranches.

Payments will be made in May/June 2022 to cover April 2022 to August 2022, and in October/November 2022 to cover September 2022 to March 2023.

The Forum have agreed that the High Needs Supplementary payments will be made on the same basis as for mainstream schools, so these payments will be actioned in two tranches, as set out above.

It was noted that payments for the grants had now been processed and would be on June oracle information. For the final calculation using the May 21 data, the overall rate for the WPN payments has reduced to £625.97 from the initial £630.69 as first forecasted.

Information suggested that supplementary grant funding would be included in the DSG grant for 2023/24.

The Working Group:

a) Note the report.

5. SEND Review Green Paper: Right Support, Right Place, Right Time

At the end of March 2022, the DfE published the SEND Review Green Paper: Right Support, Right Place, Right Time.

The consultation set out the government's proposals for a SEND system and seeks views.

The review has identified 3 key challenges facing the SEND and alternative provision system.

- Navigating the SEND system and alternative provision is not a positive experience for too many children, young people and their families.
- Outcomes for children and young people with SEND or in alternative provision are consistently worse than their peers across every measure.
- Despite the continuing and unprecedented investment, the system is not financially sustainable.

The green paper is consulting on a number of proposals to deliver greater national consistency in the support that should be made available, how it should be accessed and how it should be funded. Proposals include:

- A single national SEND and alternative provision system
- Excellent provision from early years to adulthood
- A reformed and integrated role for alternative provision
- System roles, accountabilities and funding reform
- Delivering change for children and families

The county council has been considering the Green Paper proposals, and through the Lancashire SEND Partnership, has been engaging with partners, including schools, to help shape a possible response.

Following a number of consultation events, the proposed timeline for agreeing a response is set out below

- Collate feedback and draft Lancashire SEND Partnership response for Partnership Board review - 6 June
- Sign off by Partnership Board - 19 June
- Share Consultation Partnership response - 24 June
- Consultation closes 22 July

Once the response has been shared on 24 June, it was proposed that this would be presented to the Schools Forum on 5 July to agree a forum response, with any amendments to be agreed via the urgent business procedure if necessary.

It was confirmed that the draft response would be shared with schools via the schools portal, along with an encouragement for schools to respond.

Officers explained that the complexity of the proposals meant that it had taken considerable time to develop a draft response to the consultation to the point that it could be shared with schools and the forum.

Members also discussed the link to the white paper proposals and possible timescales for implementing green paper.

The Working Group:

- a) Noted the report;**
- b) Supported the processed process for agreeing a Schools Forum response to the Green Paper consultation.**

Subsequent to the meeting, a copy of the draft Green Paper response agreed by the Lancashire SEN partnership has been shared and is attached at Appendix A. This draft will form the basis of a Schools Forum response subject to any amendments to be agreed by the Forum.

6. HNB Commissioned Place Process 2023/24

As part of the process agreed with the Schools Forum in 2020, an early notification was introduced to provide special schools and PRUs with an indicative number of places that the LA would expect to commission at each school, which would be incorporated in the school budget for the following financial year.

These arrangements had been amended in 2021, and the LA had again been reflecting on the process ahead of the 2023/24 place commissioning and a significant concern related to the availability of summer term census data to enable special school calculations to be produced and issued before the end of the summer term 2022.

The LA was therefore proposing to amend the place commission process for 2023/24, so that the correspondence to special schools will be delayed to the autumn term 2022. This should not cause a significant issue for the schools, as most special schools are full and commissioned place are largely stable. Special schools will also be able anticipate their

commissioned number, as it is based on the figures each school includes in the May 2022 census.

In addition, the additional place top up funding arrangements will continue to operate in 2023/24, where the actual number of pupils at each redetermination is greater than the number of places commissioned on the budget forecast, so a continued safety mechanism remains built into the system.

No changes are proposed to the PRU process, with correspondence on indicative place numbers for 2023/24 being circulated in autumn term 2022, to include input from the service to refine the commissioned places, and the continuation of the additional place top up funding arrangements as a continued safety mechanism.

The Working Group:

- a) Noted the report;**
- b) Supported the revised commissioned place process for 2023/24.**

Lancashire SEND Partnership – Response to the Government Green Paper SEND Review: Right support, right place, right time

Introduction

On 29 March the Government published the SEND Review: Right support, right place, right time, a consultation on the special educational needs and disabilities (SEND) and alternative provision system in England. The consultation sets out proposed reforms to the SEND and alternative provision (AP) system that seek to address three key challenges:

- poor outcomes for children and young people with SEN or in alternative provision
- navigating the SEND system and alternative provision is not a positive experience for children, young people, and their families and;
- despite unprecedented investment, the system is not delivering value for money for children, young people and families.

The **Lancashire SEND Partnership** held two events in May 2022 to discuss the proposals and respond to the consultation questions. The events were attended by professionals from education, health and care and by parents and carers. This paper provides a summary of these discussions.

Members of the Lancashire SEND Partnership Board have also contributed to the following Lancashire SEND Partnership response.

We are encouraging all our partners to submit individual responses to the consultation. We hope you find the information included here helpful in forming your own thoughts around the proposals.

The consultation closes on 22 July 11.45pm. [SEND review: right support, right place, right time - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/send-review-right-support-right-place-right-time)

Chapter 1: the case for change (page 18)

The Green Paper sets out the findings of the SEND review, which are summarised as:

- Children and young people with SEND and those in alternative provision have consistently poorer outcomes than their peers.
- Experiences of the SEND and alternative provision system are negative.
- The SEND and alternative provision system is financially unsustainable.
- There is too much inconsistency across the SEND system in how and where needs are assessed and met.
-

Chapter 2: a single national SEND and alternative provision system (page 26)

The Green Paper proposes:

- establishing a new national SEND and alternative provision system setting nationally consistent standards for how needs are identified and met at every stage of a child's journey across education, health, and care.
- reviewing and updating the SEND Code of Practice to ensure it reflects the new national standards to promote nationally consistent systems, processes, and provision.
- establishing new local SEND partnerships, bringing together education (including alternative provision), health and care partners with local government and other partners to produce a local inclusion plan setting out how each local area will meet the national standards.
- introducing a standardised and digitised EHCP process and template to minimise bureaucracy and deliver consistency.
- supporting parents and carers to express an informed preference for a suitable placement by providing a tailored list of settings, drawn from the local inclusion plan, including mainstream, specialist and independent, that are appropriate to meet the child or young person's needs.
- streamlining the redress process, making it easier to resolve disputes earlier, including through mandatory mediation, whilst retaining the tribunal for the most challenging cases

Q1: What key factors should be considered when developing national standards to ensure they deliver improved outcomes and experiences for children and young people with SEND and their families? This includes how the standards apply across education, health and care in a 0-25 system.

Agreed that nationally consistent standards with clear responsibility and accountability should be in place across education, health and care. This should provide guidance related to reasonable adjustments and how greater consistency across authorities can be achieved.

Standards should focus on preparing for adulthood outcomes rather than attainment measures.

Minimum standards for training and development and assessment should be in place across all agencies.

The Local Offer should outline standards and appropriate support, this should include available resources for settings and schools.

We noted that some flexibility will be needed in the system to reflect available provision and differing levels of need.

Q2: How should we develop the proposal for new local SEND partnerships to oversee the effective development of local inclusion plans whilst avoiding placing unnecessary burdens or duplicating current partnerships?

Standardise SEND Partnership membership, responsibility and accountability at a national level. Partnerships should include SENDCOs and CYP with direct experience of the SEND system. It is also important to ensure the full geography of local areas is represented.

To be effective SEND partnerships must have the ability to hold partners to account to deliver on shared areas of work to support the needs of children and young people.

The Lancashire SEND Partnership Board is already well established and will continue to develop.

Q 3: What factors would enable local authorities to successfully commission provision for low-incidence high cost need, and further education, across local authority boundaries?

- Agree minimum standards of provision across local authorities.
- Implement nationally consistent, transparent assessments across services.
- Ensure comprehensive information of available services is on Local Offer websites.
- Understand and address the barriers for young people and providers related to further education.
- Share responsibility and accountability for young people across local authorities.
- Facilitate regional commissioning groups to ensure a one commissioning approach with aligned planning cycles.

Q 4: What components of the EHCP should we consider reviewing or amending as we move to a standardised and digitised version?

- Consideration should be given to raising EHCP thresholds to ensure plans are better focused and co-produced, this may include decisions to offer a support plan short of EHCP.
- Guidance - clarity required on expected content, length and coproduction expectations
- Stronger requirements under Preparing for Adulthood
- Distinct areas to detail the child or young person's strengths and difficulties
- Ability for information to link across systems so families only need to share their journey once

Q5: How can parents and local authorities most effectively work together to produce a tailored list of placements that is appropriate for their child, and gives parents' confidence in the EHCP process?

Parents and local authorities should both have opportunity to propose placements linked to the child or young person's needs as outlined in their EHCP. Parents need to be confident that the right professionals are involved, know their child and are advocating for their needs.

To support this it is important to ensure a full list of available placements is maintained, up to date and easily accessible for all to review. Full placement lists should provide key placement information and be presented consistently across authorities.

Reasonable communication parameters should be agreed so parents understand what to expect by when.

Q6: To what extent do you agree or disagree with our overall approach to strengthen redress, including through national standards and mandatory mediation?

Agree with notion of resolving issues prior to tribunal. Ensuring decision makers attend mediation will be essential to resolving disputes.

Noted that changes to the appeal process may result in EHCP timescales not being met and staffing levels not at capacity to support process.

Q7: Do you consider the current remedies available to the SEND Tribunal for disabled children who have been discriminated against by schools effective in putting children and young people's education back on track?

The tribunal process is effective; however families report that it is time consuming and stressful and often impacts upon children and young people's transition. Change to the process is welcomed.

Chapter 3: excellent provision from early years to adulthood (page 37)

The Green paper proposes:

- Increase our total investment in schools' budgets by £7 billion by 2024-25, compared to 2021-22, including an additional £1 billion in 2022-23 alone for children and young people with complex needs.
- Consulting on the introduction of a new SENCo National Professional Qualification (NPQ) for school SENCos and increase the number of staff with an accredited Level 3 SENCo qualification in early years settings to improve SEND expertise.
- Commissioning analysis to better understand the support that children and young people with SEND need from the health workforce so that there is a clear focus on SEND in health workforce planning.
- Improving mainstream provision, building on the ambitious Schools White Paper, through excellent teacher training and development and a 'what works' evidence programme to identify and share best practice, including in early intervention.
- Funding more than 10,000 additional respite placements through an investment of £30 million, alongside £82 million to create a network of family hubs, so more children, young people and their families can access wraparound support.
- Investing £2.6 billion, over the next three years, to deliver new places and improve existing provision for children and young people with SEND or who require alternative provision. We will deliver more new special and alternative provision free schools in addition to more than 60 already in the pipeline
- Setting out a clear timeline that, by 2030, all children will benefit from being taught in a family of schools, with their school, including special and alternative provision, in a strong multi-academy trust (MAT), or with plans to join or form one, sharing expertise and resources to improve outcomes.
- Investing £18 million over the next three years to build capacity in the Supported Internships Programme, and improve transitions at further education by introducing Common Transfer Files alongside piloting the roll out of adjustment passports to ensure young people with SEND are prepared for higher education and employment

Q8: What steps should be taken to strengthen early years practice with regard to conducting the two-year-old progress check and integration with the Healthy Child Programme review?

Early identification and early intervention through the two year old check and the use of one standard document available as a virtual form should be available in advance of the two year check.

Improvements should ensure processes are joined up so children do not fall between gaps and all feedback is shared with appropriate teams. Further engagement between HV and nurseries to support this process would be welcomed. Provision of face to face support for families and clear guidance on how to approach families who don't engage.

Q9: To what extent do you agree or disagree that we should introduce a new mandatory SENCo NPQ to replace the NASENCo?

We agree that quality training is important for all SENCOs. It is important that the emphasis on SEND being Everyone's Business is maintained and all teachers understand their responsibility, not just the school SENCO. The SENCO is a critical role and requires additional support and protected time.

Q10: To what extent do you agree or disagree that we should strengthen the mandatory SENCo training requirement by requiring that headteachers must be satisfied that the SENCo is in the process of obtaining the relevant qualification when taking on the role?

There is a set time frame for doing the qualification. We see the training as necessary within the time frame however suggest gaining some experience before undertaking the training is beneficial.

Q11: To what extent do you agree or disagree that both specialist and mixed MATs should coexist in the fully trust-led future? This would allow current local authority maintained special schools and alternative provision settings to join either type of MAT.

Lots of mainstream provision already has specialist provision due to rising numbers and a model linking levels of support/provision within trusts for children to move through would be welcomed.

It will be important for all settings to be aware of what is available. Having expertise on hand for support may result in children staying in school with support coming to them.

Q12: What more can be done by employers, providers and government to ensure that those young people with SEND can access, participate in and be supported to achieve an apprenticeship, including through access routes like Traineeships?

- Extend internship programmes to support more young people, and provide a greater variety of activity that can be accessed by a greater variety of young people
- Engage employers, providers and government with the 'SEND is Everyone's Business' way of thinking to increase awareness of SEND conditions and increase understanding of simple reasonable adjustments that can be put in place.
- Establish/extend quotas for large companies to employ young people with SEND, including local authorities who should lead by example by employing more young people with SEND.
- Provide young people with guidance through the transition process with wraparound support about what to expect from employment and how to get into employment, including life skills and informal education.
- Support employers to look beyond qualifications to what other skills someone with SEND can offer a workplace.
- Support colleges to deliver flexible provision to meet individual needs particularly those achieving at entry level and to link this in with employers' needs.

Chapter 4: a reformed and integrated role for alternative provision (page 56)

The Green Paper proposes:

- making alternative provision an integral part of local SEND systems by requiring the new local SEND partnerships to plan and deliver an alternative provision service focused on early intervention.
- giving alternative provision schools the funding stability to deliver a service focused on early intervention by requiring local authorities to create and distribute an alternative provision-specific budget.
- building system capacity to deliver the vision through plans for all alternative provision schools to be in a strong multi-academy trust, or have plans to join or form one, to deliver evidence-led services based on best practice, and open new alternative provision free schools where they are most needed.
- developing a bespoke performance framework for alternative provision which sets robust standards focused on progress, re-integration into mainstream education or sustainable post-16 destinations.
- delivering greater oversight and transparency of pupil movements including placements into and out of alternative provision.
- launching a call for evidence, before the summer, on the use of unregistered provision to investigate existing practice

Q13: To what extent do you agree or disagree that this new vision for alternative provision will result in improved outcomes for children and young people?

Support for schools to adapt their own settings to support children and reduce exclusions by having facilities in place ie provision of intensive support / development of sensory rooms.

Agree that the vision is very positive and we support the intention to ensure as many children as possible stay in or return to mainstream education as soon as possible.

More alternative provision settings are required as current capacity is not sufficient. Lengthy lead times to access support can result in negative perceptions.

To support this vision better quality support is needed in mainstream schools, more early interventions, guidelines around expected levels of targeted support and time limits on provision.

Agree that sustainable funding is required to support planning and delivery.

Q 14: What needs to be in place in order to distribute existing funding more effectively to alternative provision schools to ensure they have the financial stability required to deliver our vision for more early intervention and reintegration?

Consideration on how potential deficits in health funding around CAMHS, Positive Behaviour Support, ASD specialist roles, training for children with complex health needs will be addressed.

Developing more localised provision is a priority and will require increased funding to develop alternative provision within mainstream settings.

Flexible funding is needed to enable different types of alternative provision to be supported.

Ability to pool resources across schools, in terms of expertise and funding.

Improve the management of exclusions by removing perverse incentives that enable exclusions to be used as a tool to secure support.

Development of further SEND units, providing shared facilities for local children within a mainstream setting.

Q15: To what extent do you agree or disagree that introducing a bespoke alternative provision performance framework, based on these five outcomes, will improve the quality of alternative provision?

Agreed with the outcomes, unclear how these can be practically delivered. Academic attainment may be challenging at mainstream school and meeting needs is more important. Suggested exclusions be added to the five outcomes and performance measures related to pupil movements should be tracked.

Q16: To what extent do you agree or disagree that a statutory framework for pupil movements will improve oversight and transparency of placements into and out of alternative provision?

A clear framework for all is needed to support consistency and equal opportunities/access. This should include thresholds across schools, expected levels of communication and managed moves guidance.

Chapter 5: system roles, accountabilities, and funding reform (page 65)

The Green Paper proposes:

- delivering clarity in roles and responsibilities with every partner across education, health, care, and local government having a clear role to play, and being equipped with the levers to fulfil their responsibilities
- equipping the Department for Education's (DfE) new Regions Group to take responsibility for holding local authorities and MATs to account for delivery for children and young people with SEND locally through new funding agreements between local government and DfE
- providing statutory guidance to Integrated Care Boards (ICBs) to set out clearly how statutory responsibilities for SEND should be discharged
- introducing new inclusion dashboards for 0-25 provision, offering a timely, transparent picture of how the system is performing at a local and national level across education, health, and care
- introducing a new national framework of banding and price tariffs for funding, matched to levels of need and types of education provision set out in the national standards
- working with Ofsted/Care Quality Commission (CQC) on their plan to deliver an updated Local Area SEND Inspection Framework with a focus on arrangements and experience for children and young people with SEND and in alternative provision

Q17: What are the key metrics we should capture and use to measure local and national performance? Please explain why you have selected these

A greater emphasis should be given to child focused, outcome based measurements, with less emphasis on academic measures.

A measure on how well/easily families have navigated the SEND system, ie have practitioners been involved at the right time and are families receiving the information and guidance they need.

Noted that national health data is not available, but this should be collected and agreement reached on what data is required from health long-term.

Improvements to data sharing between different sectors is needed.

Q18: How can we best develop a national framework for funding bands and tariffs to achieve our objectives and mitigate unintended consequences and risks?

Basic level funding provided for SEN - Additional funding provided after the EHCP (E1, E2, E3, E4). Any changes in funding needs to reflect the complexities of the SEND.

Improved communication and information across the banding systems so families can understand their position.

Funding support must address all the child or young person's needs across services and include co-commissioning.

Chapter 6: delivering change for children and families (page 74)

The Green paper proposes:

- taking immediate steps to stabilise local SEND systems by investing an additional £300 million through the Safety Valve Programme and £85 million in the Delivering Better Value programme, over the next three years, to support those local authorities with the biggest deficits.
- tasking the SEND and Alternative Provision Directorate within DfE to work with system leaders from across education, health and care and the Department of Health and Social Care to develop the national SEND standards.
- supporting delivery through a £70 million SEND and alternative provision change programme to both test and refine key proposals and support local SEND systems across the country to manage local improvement.
- publishing a national SEND and alternative provision delivery plan setting out government's response to this public consultation and how change will be implemented in detail and by whom to deliver better outcomes for children and young people.
- establishing, for implementation of the national delivery plan, a new National SEND Delivery Board to bring together relevant government departments with national delivery partners including parents, carers and representatives of local government, education, health, and care to hold partners to account for the timely implementation of proposals.

Q19: How can the National SEND Delivery Board work most effectively with local partnerships to ensure the proposals are implemented successfully?

We share the view that co-production drives service improvement.

It is important to work together at a national level as well as locally ie National SEND Delivery Board should work in partnership with NHSE.

Clear accountability and governance in place to manage improvements and address risks. Provision of clear robust guidance and expectations of all partners.

Local engagement, a key representative from the NSD board to be involved in local partnership developments.

Q20: What will make the biggest difference to successful implementation of these proposals? What do you see as the barriers to and enablers of success?

Enablers

- Further consultation events ahead of finalising White Paper to evidence commitment to co-production and partnership working
- Shared accountability between professionals and families. Clear responsibilities outlined for all partners with families effectively engaged.
- Clear guidance on staffing caseloads to enable professionals the time to provide the right support at right time
- Regular clear communication regarding changes
- Availability of provision/support

Barriers

- Finance – additional funding is required to address deficit whilst proposals are being implemented.
- Staffing capacity across all partners – currently impacts timeliness of support and can result in poor relationships with families.
- Transition process, large scale change to deliver across stretched services. Staffing resource and finance required for training and implementation of proposals.
- Health is a key partner within SEND however it is not included within the review. What are the proposals for ensuring Health and associated processes are joined up as part these proposals?
- Ensuring join up across services- many partners involved and different information held for each. Challenge will be ensuring cohesion and commitment across partners.
- Conflicting policy strands relating to the ambitions for children and young people with SEND.

Q21: What support do local systems and delivery partners need to successfully transition and deliver the new national system?

- Additional funding to implement proposals whilst supporting ongoing demand which continues to rise within the sector.
- Clear guidance regarding national standardisation, expectations, and time frames.
- Further support needed with funding and long-term planning. No budget for SEND within Health.
- Staff training required to support the withdrawal of SEND support at the right time.
- SEND awareness training for all new recruits to services within the SEND partnership.
- Allocated time for SENCOS to disseminate training and information.
- Waiting lists to be given ratings of need.

Q22: Is there anything else you would like to say about the proposals in the green paper?

- Further Education gets a mention but where is Higher Education?
- Term 'most appropriate local setting' is used. Without criteria this might cause issues because it comes down to who decides and what we define as 'appropriate' (p38)
- Investment is often not enough and is not matched in health which is problematic when health is required to deliver; 'timely and effectively access and support'.
- Feels like it's going to get harder for children and young people who require specialist provision to access the provision that meets their needs.
- Lack of a long view.
- Severe lack of therapists that children and young people need regularly – can we not find easier ways in for mature apprenticeship course approach to attract wider groups of people who can support the CYP
- The positioning of the review process, sometimes it needs to be reflective of the SEND needs rather than timetable, to strengthen the review process, stop it being a paperwork exercise.

- Sensory difficulties which are hard to manage in schools, there needs to be a specialist facility which will help these children, really helps being in the right environment however there isn't the choice
- Education is priority in paper and health services are rarely discussed or invested in
- We are concerned that a focus on outcomes in mainstream settings may be detrimental to children and young people with SEND.
- Annual health care plans are reviewed annually, care can change in between those times and plans become outdated and not reflective of needs. The pace of change is not always reflected in the plans. A mechanism is required to reflect need rather than the timetable of reviews. Inspectors refer to 'assessment of need' which is not reflected in practice.

LANCASHIRE SCHOOLS FORUM
Date of meeting 5 July 2022

Item No 9

Title: Recommendations of the Early Years Block Working Group

Executive Summary

On 16 June 2022, the Early Years Block Working Group considered a number of reports, including:

Background

On 16 June 2022, the Early Years Block Working Group considered a number of reports. A summary of the information presented, and the Working Group's recommendations are provided below:

- Early Years SEN Inclusion Fund Group;
- Supporting Actions to Raise Awareness of EY Funding Issues with DfE;
- LCC Family Safeguarding Model;
- 2021/22 Schools Budget Outturn Report;
- School Balances and Clawback 2021/22;
- Schools Forum Annual Report 2021/22;
- Funding Agreement/ Memorandum of Understanding 2022/23;
- Early Years Working Group Questionnaire;
- 2 Year Old Staffing Ratio Change;
- SENCO Level 3 Qualification;
- Working Group Chair.

A summary of the information presented, and the Working Group's recommendations are provided in this report.

Recommendations

The Forum is asked to:

- a) Note the report from the Early Years Block Working Group held on 16 June 2022;**
- b) Ratify the Steering Group's recommendations.**

Background

On 16 June 2022, the Early Years Block Working Group considered a number of reports. A summary of the information presented, and the Working Group's recommendations are provided below:

1. Early Years SEN Inclusion Fund Group

It was confirmed that the invitation to the last SEN Inclusion Group meeting had been extended to the whole EY working group membership, to facilitate wider discussions with the service.

The Working Group:

- a) Noted the information.**

2. Supporting Actions to Raise Awareness of EY Funding Issues with DfE

Subsequent to earlier representations, CC Jayne Rear, the Cabinet Member for Education and Skills had written to the Secretary of State for Education, highlighting the key concerns around funding and recruitment/retention impacting on the sector in Lancashire. A response had been received from Will Quince MP, Parliamentary Under-Secretary of State for Children and Families. Following the reply, a visit to Lancashire had been arranged with senior DfE officials and visits to a maintained and PVI setting were being scheduled.

The Working Group:

- a) Noted the information:**
- b) Welcomed the proposed visit by DfE officials.**

Subsequent to the meeting a copy of the letter from the Cabinet Member and the response were circulated to working group members for information.

3. LCC Family Safeguarding Model

Officers reported that some initial enquiries had been made following questions raised by the group. It was agreed that a meeting would be arranged with relevant Early Help officers to take discussions forward. Philippa Perks and Jan Holmes volunteered to represent the group at the discussions.

The Working Group:

- a) Noted the information:**
- b) Welcomed the proposed meeting with County Council Officers.**

Subsequent to the meeting a link was circulated providing further information about the Family Safeguarding Model, which is available [here](#)

4. 2021/22 Schools Budget Outturn Report

This report provided the Working Groups with details of the 2021/22 Schools Budget final financial outturn position, in relation to each funding block. A copy of the full report presented to the working group is provided as an appendix to the Schools Block summary report.

The Overall Schools Budget outturn position for 2021/22 showed an underspend of circa £8.4m.

Further details were provided in connection with each funding block and members concentrated on the Early Years Block position. It was noted that the Early Years Block outturn position for 2020/21 indicated a circa £1.5m underspend which meant there would have been an overspend without the circa £2m transfer from Schools Block.

Key issues discussed included:

Commissioned Services

Commissioned Services in the Early Years Block related to the Inclusion Fund and expenditure was circa £55k below budget.

Previous years underspends on this budget have prompted the Early Years Working Group to agree significant changes to the inclusion fund process, with increased funding rates, expanded eligibility and a streamlined application process introduced from September 2021.

It was estimated that the full year effect of the changes introduced part way through 2021/22 would mean that inclusion fund expenditure will in future be up to the agreed budget level, or perhaps beyond it.

Members commented that the childminder eligibility for the fund had not been introduced from September 2021 as originally planned and was now due to take place from September 2022.

DSG Grant

Grant payment calculations for the early years block were temporarily amended by the DfE for 2021/22 so that the payments were based on actual take up each term. The actual grant income for the year was some £3.5m below the original budget, as early years take up was below the level forecast in the original 2021/22 budget. Members commented that the take up of places in the 3 and 4 year old offer may be related to the post pandemic recovery.

It was noted that adjustments could still be applied in relation to the spring term 2022 which are scheduled by the DfE to be actioned in July 2022.

Confirmation was provided that the Early Years underspend could be used to assist with any early years DSG adjustment required in July 2022 and towards the additional £1m contribution agreed in the 2022/23 early years budget.

The Working Group:

- a) Noted the report and the 2021/22 Schools Budget final financial outturn position.**

5. School Balances and Clawback 2021/22

This report set out the year end position of schools' delegated budgets at 31 March 2022. A copy of the full report presented to the working group is provided as an appendix to the Schools Block summary report.

The final outturn position against schools delegated budgets at 31 March 2022 was an underspend of £5.173m. This meant that school balances had increased by £5.173m in 2021/22, to a total of £95.325m.

Further details were provided, and members concentrated on the Early Years Block schools.

It was noted that the outturn position at maintained nursery schools remained the most concerning phase highlighted through these tables, with 6 out of 24 schools ending the financial year in deficit, representing 25% of schools in the sector.

Members noted that substantial work had now been undertaken at the schools with the most serious deficits and the budget positions had now been stabilised. However, the size of accumulated deficits at some of the schools meant that the deficits were not repayable in the statutory 3 year period and the county council was considering what options were available as part of the maintained nursery school review.

A change to the legal status relating to the leasing of school buildings was discussed, which was impacting on the ability of some schools to generate further income. Officers agreed to raise this issue with the LCC Estates and Legal teams, with relevant directors and with DfE officials when they visited Lancashire.

School Balances and Clawback Policy 2022/23

Whilst clawback has been suspended on year end balances at March 2020, 2021 and 2022, the guideline balance policy remained unchanged, as follows:

- 12% of Consistent Financial Reporting (CFR) income for all phases of maintained school
- A £60,000 minimum balance threshold will be applied.

The group were asked to consider the school balances and clawback policy to be applied at 31 March 2023.

Clawback Exemption Request 2022/23

Members also considered an exemption from clawback for a Lancashire secondary school that has been saving funding towards a sports hall.

Schools Budget Reserves 2021/22

The 31 March 2022 position on Schools Budget Reserves was also considered, and it was noted that the total of all schools reserves was £126.872m, an increase of circa £16m.

Members considered questions posed around the School Teaching and Support Staff Supply Reimbursement Scheme reserve, which ended the year with an underspend of circa £0.4m, leaving an outturn position of circa £2.3m. The overall in year position includes a surplus on the teacher scheme of just under £0.6m, which was offset by a circa £0.2m deficit on the support staff scheme.

The Forum had previously agreed that any year end balance above £1.25m should be redistributed to scheme members. The working group considered if £1.25m remained an appropriate maximum level for the reserve or if it should increase to say £1.5m.

Members discussed key issues highlighted in the report and made a number of recommendations.

The Working Group:

- a) Noted the report;
- b) Noted the overall position on school balances at 31 March 2022, including the individual school level information provided in the report;
- c) Noted the further considerations that were taking place around the financial position of some maintained nursery schools;
- d) Requested that officers investigate the leasing of school buildings issues;
- e) Recommended that clawback of revenue balances above the guideline figure should be reinstated at 31 March 2023, at previous levels:
 - A clawback rate of 50% is to be applied to any balance above guideline in the first year a school exceeds the guideline (after adjusting for exemptions);
 - A clawback rate of 100% is to be applied to any balance in excess of guideline where the guideline has been breached for two or more consecutive years (after adjusting for exemptions);
(Note: As clawback was suspended in 2021/22, no school would be subject to the 100% clawback rate in 2022/23).
- f) Recommended that the minimum balance threshold be increased to £75,000, to offer greater protection for small schools, including nursery schools;
- g) Supported a clawback exemption applying to a Lancashire secondary school saving towards a sports hall project;
- h) Noted the underspend on the supply scheme budget at 31 March 2022 and recommended that the level of scheme reserve be increased to £1.5m and any funding in excess of this at March 2022 be reimbursed to scheme members, on the basis of contribution levels to the teaching staff scheme only;

6. Schools Forum Annual Report 2021/22

Each year the Schools Forum publishes an annual report setting out items of business in which the Forum has been involved

A draft report for 2021/2022 was presented for consideration, and the HNB issues were highlighted.

The Working Group:

- a) Noted the report;
- b) Recommend to the Schools Forum that the 2021/22 Annual Report be approved for publication, subject to the correction of a typographical error on page 5.

A copy of the updated version of the 2021/22 Annual Report is provided as an appendix to the Schools Block summary support.

7. Funding Agreement/ Memorandum of Understanding 2022/23

A report was presented that provided a final version of the 2022/23 Funding Agreement/ and Memorandum of Understanding.

The Early Years Consultative Group were given the opportunity to comment and feedback on the proposed changes to the new agreements prior to the final versions being signed off

by LCC senior managers. The feedback received was supportive and in agreement to the changes proposed.

The report summarised the changes to each document.

At the working group, members did query the changes in both documents to section 11 'Notice Period and Transfer of Entitlement' around the reasons for the amendment to allow the parent/carer/guardian to reduce the number of funded hours outlined in the agreement.

It was noted that providers could protect themselves against losses due to the staffing commitments they may have made by increasing the number of week's written notice that was needed to implement the reduction.

The Working Group:

- a) **Noted the report and the revised agreements.**
- b) **Requested clarification of the amendment to section 11 Notice Period and Transfer of Entitlement around the reasons for the amendment to allow the parent/carer/guardian to reduce the number of funded hours outlined in the agreement.**

8. Early Years Working Group Questionnaire

Previous discussions at the working group have highlighted challenges facing the sector.

In order to facilitate feedback from the sector to help inform working group discussions with officers and members, the Working Group Chair initiated the development of a questionnaire, seeking views on some key issues. These included the hidden costs of meeting children's individual needs and ensuring high quality learning when children have additional needs and also about the support available and recruitment and retention issues.

Officers and Early Years members of the Schools Forum contributed to the refinement of the questionnaire and once finalised, this was published as an eform.

A communication was issued on 3 May 2022, via email for the PVI sector and on the portal for maintained settings, inviting colleagues to participate and share their views by completing the eform. A reminder was also issued to all providers on 17 May 2022.

Responses were requested by 27 May 2022 and by the closing date 121 responses had been received.

An analysis of the responses and all the comments received were provided for consideration by the working group.

Initial comments from the group included:

- 121 replies were a positive response rate from the sector
- Overall, the responses validate many of the views expressed by the working group about some of the key challenges facing the sector

It was noted that the Speech and Language service received a number of negative comments and less favourable approval ratings. Early years officers present at the meeting explained that there were meeting in the near future with Public Health Specialists who were involved

with this service and the matter could also be aired at the 'Best Start in Life' Board. Early feedback suggested that officers were already aware of some of the challenges and were open to making service improvements.

The number of referrals being received by the service was also highlighted, and it was noted that not all referrals were for appropriate children. Work was being undertaken to develop a Speech and Language roadmap to help settings determine appropriate referrals to the service.

The Group also discussed some concerns about other service highlighted in responses, for example Health Visitors. It was agreed that a priority remained to ensure Child minders had access to the Inclusion Fund from September 2022. Work was underway to develop systems that were more joined up across services to assist with targeting delivery, but it was noted that a number of IT challenges remained.

Considerable challenge's remained in connection with the recruitment and retention of staff in the sector and this was further evidenced by the questionnaire responses. The development of a workforce strategy was highlighted, as was the need for colleges to develop relevant courses.

It was note that many of the challenges highlighted in the responses provided useful evidence that could be shared when the DfE visited the County, to highlight the challenges being faced by the sector in Lancashire.

The Working Group:

- a) Noted the report and the questionnaire analysis and comments;**
- b) Welcomed the actions highlighted in response to concerns raised;**
- c) Note that evidence from the response would be shared with DfE officials.**

9. 2 Year Old Staffing Ratio Change

The children and families minister Will Quince confirmed that the Department for Education will consult 'before the summer' on plans to raise the number of two-year-olds that one member of staff can care for in early years settings in England from four to five.

Information was provided for the group which had been produced by the Working Group Chair, setting out some initial concerns about the proposals.

It was note that the information had also been presented to the Education Recovery Board.

Members discussed this possible DfE staffing ratio change development and supported the concerns set out in the report.

The Working Group is asked to:

- a) Note the report;**
- b) Supported the concerns set out in the report about the proposed staffing ratio change.**

10. SENCO Level 3 Qualification

Officers provided a verbal update on proposals to develop and offer a SENCO level 3 qualification for Lancashire providers.

A pilot programme covering 2 tranches of learners was suggested.

In line with questionnaire feedback, the costs of provision were seen as a potential barrier to the development and finance colleagues had indicated that it may be possible to pay for the pilot programme centrally, perhaps using some early years block underspends from 2021/22. Initial forecasts estimated a cost of circa £20k.

The Working Group:

- a) Noted the information;**
- b) Welcomed the proposed development;**
- c) Supported the use of reserves to meet the estimated £20k costs of the pilot programme.**

11. Working Group Chair

Peter Hindle reported that he would be resigning from the Forum and the working group after the October 2022 round of meetings.

Philippa Perks had kindly volunteered to Chair the group after Peter's departure.

A formal item on the next working group agenda would seek to confirm the new appointment.

The Working Group:

- a) Noted the information.**

LANCASHIRE SCHOOLS FORUM
Date of meeting 5 July 2022

Item No 10

Title: Recommendations of the Apprenticeship Levy Steering Group

Executive Summary

On 16 June 2022, the Apprenticeship Levy Steering Group considered a number of reports, including:

- School Apprenticeship Levy Update

A summary of the information presented, and the Working Group's recommendations are provided in this report.

Recommendations

The Forum is asked to:

- a) Note the report from the Apprenticeship Levy Steering Group held on 16 June 2022;**
- b) Ratify the Steering Group's recommendations.**

Background

On 16 June 2022, the Apprenticeship Levy Steering Group considered a number of reports. A summary of the information presented, and the Working Group's recommendations are provided below:

1. School Apprenticeship Levy Update

General Update

105 new Requests for Funding had been received and approved since October 2021. Currently there are 269 on-going apprentices, 55 awaiting enrolment, and 274 have completed their apprenticeship.

The total value of apprenticeship requests for this window of opportunity are at approx. £1,200,000 over the duration of the apprenticeships.

Transfer requests, totalling £334,000, have been agreed to date, with 1 enrolment outstanding.

It was highlighted that the Pooled Payroll issue was still unresolved. A LGA round table meeting with ESFA took place September 2021, but issues remain with a focus on finding a solution still needed. Details will be updated via the portal as soon as there is anything to report.

The team is working on a New School Apprenticeship Guide, which is due to be released for September 2022 and will be circulated to all schools. A new work based planning form for schools to complete from September for any requests will also be launched, which will help the service plan our team resource. The Apprenticeship Ambassadors are also to be relaunched to coincide with the new offer.

Procurement update

Procurement of contracts was the main focus of activity for the service through spring and summer 2021. Most of this process has now been completed for the schools side and the following contracts have been awarded:

- Ripley St Thomas SCITT will deliver Teacher L6 instead of Star Academies
- Nelson & Colne will continue the delivery of TA ,EY and SBP L4 and Facilities L3
- NLTG will now deliver Business Admin and the Leadership and Management (L5 Ops Manager) & Project Management portfolio
- UCLan will now deliver Senior Leader L7 and CMDA L6 degree apprenticeships
- Blackburn College will deliver all finance/accounting related apprenticeships
- Kendal College will continue with L3 Outdoor Activity Leader and Outdoor Activity leader L5

The team are in discussions with Play Therapy UK to deliver Play Therapist L7 in September subject to numbers. In addition, the service is engaging with the Lancashire FA to deliver an initial pilot programme for 6 L4 Sports Coach Apprenticeships, to start in September 2022. Apprentices must be supervised at all times by a qualified teacher and cannot deliver PE curriculum independently or breakfast or after school Sports sessions without a teachers supervision.

Kickstart Success In Schools

The Kickstart Scheme was a new programme launched by the government in September 2020 to December 2021 to deliver funding for employers offering new job roles for 16-24 years olds who are currently in receipt of Universal Credit. The programme was aimed at preventing young people who are currently unemployed facing long term unemployment. For each job placement created, the employer received £1,500 in funding. In Lancashire schools -there have 27 successful Kickstart placements to date.

7 of these have converted into apprenticeships funded by the LCC levy with one more in the pipeline for later this summer. One of the placements was nominated as finalist for the Kick Start/Apprenticeship of the year.

School Engagement

Engagement with school was still proving a challenge for the team, especially post covid, with schools not spending their share of apprentice levy income.

The working group offered some suggestions to assist with this, which included may of the channels that the team were already utilising.

Apprentice Incentive Payment

A payment of £1,000 is available to an employer for taking on an apprentice who is either:

- aged 16 to 18 years old
- under 25 and has an education, health and care plan or has been in the care of their local authority

This £1000 payment will be paid via your training provider. The payment is different to apprenticeship levy funds, so can be spend on anything to support your organisation's costs. For example, on uniforms, your apprentice's travel or their salary.

Recruitment

The team are making a big push of school vacancies, which can be uploaded to the LCC website, schools recruitment site and Indeed and where resource allows uploaded to the National Apprenticeship Service website (NAS).

The New Hire Employer Incentive Payment ended in January 2022 – to date 84 claims with a value of £210,000 submitted for apprentices that have been recruited into LCC schools and a total of £114,000 having already been paid to them.

Team members are in regular contact with the schools helping them with the recruitment and vacancy documentation and process. All new documents have been uploaded to the schools portal A-Z for schools to download including our new schools training menu for 2021/22.

Job support packs have been developed to aid schools in completing their adverts.

Financial position

An update was provided on the school financial position, including:

- Annual Schools Levy fund approx. £1.3m (down due to academisation, as was approx. £1.4 m)
- Spend across Levy schools in 2017/2018 £28,098

• Spend across Levy schools in 2018/2019	£314,414
• Spend across Levy schools in 2019/2020	£566,115
• Spend across Levy schools in 2020/2021	£619,564
• Spend across Levy schools in 2021/2022	£871,005
• Spend to date 2022/2023	£148,359
• Forecast spend this year 2022/2023 approx.	£1,118,606
• Total spend to date	£2,547,555

The Group:

- a) **Noted the information;**
- b) **Expressed frustration at the continued difficulties caused by school pooled payroll issues;**
- c) **Thanked the Apprenticeship Levy Team for their continued hard work and dedication during difficult circumstances.**

LANCASHIRE SCHOOLS FORUM

Date of meeting 5 July 2022

Item No 12

Title: Support for Ukrainian Families

Appendix A refers

Executive Summary

This report provides an update on the Support for Ukrainian Families available in the county.

Forum Decision Required

The Forum is asked to:

- a) Note the report;**
- b) Express any views on the Education Strategy 2022-2025 and Team Around the School and Settings**

Background

Information has been requested at a previous Schools Forum meeting about the support available in Lancashire for Ukrainian families arriving in Lancashire.

Updates have been provided to schools around this support in the regular Education Bulletin. An extract from this guidance is provided at **Appendix A**.

On the issue of funding the guidance notes that we are hoping to receive further clarification from the DfE as how the education top-up funding that will be allocated to Lancashire can be used. It is clear already however that this funding will only be available for the children of families arriving in Lancashire as part of the Homes for Ukraine scheme.

In early discussions, it has been stressed that not all the education funding that is allocated to Lancashire will be fully passported to schools as monies will need to be retained to provide Early Years support, SEND support, Early Help, EAL support etc. A decision will be made shortly as to how much is top sliced and how much is allocated to the schools. Communications will be issued via the education bulletin once the amount to be passed to schools is determined, and there will be clarification as to how and when any payments will be made. For future years, DSG funding will capture Ukrainian pupils on roll from the October 2022 census.

For information the DfE allocations for eligible education top-up funding that local authorities will receive for Ukrainian refugee pupils are:

- Early Years - £3,000 per pupil
- Primary - £6,580 per pupil
- Secondary - £8,755 per pupil

Support for Ukrainian Families

Funding

We are hoping to receive further clarification from the DfE as how the education top-up funding that will be allocated to Lancashire can be used. It is clear already however that this funding will only be available for the children of families arriving in Lancashire as part of the Homes for Ukraine scheme.

In early discussions, it has been stressed that not all the education funding that is allocated to Lancashire will be fully passported to schools as monies will need to be retained to provide Early Years support, SEND support, Early Help, EAL support etc. A decision will be made shortly as to how much is top sliced and how much is allocated to the schools. Communications will be issued via the education bulletin once the amount to be passed to schools is determined, and there will be clarification as to how and when any payments will be made. For future years, DSG funding will capture Ukrainian pupils on roll from the October 2022 census.

School Admissions

In Ukraine, children do not attend school until they are 6. Consequently, the English school's system will be unfamiliar to parents from Ukraine. The DfE is hoping to disseminate advice to parents, with assistance from the Authority and schools, to help parents understand that children of compulsory school age must attend school full-time unless the LA is assured the child is receiving suitable home education. A link to the welcome pack; [Welcome Pack for refugees from the Ukraine](#) will be available on the LCC website. It would be helpful if schools could also publish this link on their websites with their general admissions advice to parents.

At the beginning of April 2022, the DfE issued guidance on providing for school places for children arriving from the Ukraine; [The Secretary of State for Education wrote to all local authority Directors of Children's Services and Chief Executive Officers today](#)

Last week the DfE also updated their website on school access rights for foreign national students which will shortly be updated: <https://www.gov.uk/guidance/schools-admissions-applications-from-overseas-children>.

Firstly, the DfE makes it clear that all children living in the UK have a right to access a school in England, irrespective of their nationality. It says: *'School admission authorities must not refuse to admit a child on the basis of their nationality or immigration status nor remove them from roll on this basis.'*

Lancashire's published in-year admission arrangements should be applied to the admission to school of Ukrainian children in the same way as they do for all other children. Parents have the right to express a preference for any school(s) and in-year admission applications should be processed in the normal way. Parents can make an in-year application for a community school by visiting the LCC website, [Community and voluntary controlled school in-year applications - Lancashire County Council](#). The website also provides contact details for the area Pupil Access Teams who can provide up to date information about the number of pupils on roll at any school and hence advise on school place availability.

Applications for community and controlled schools are dealt with by Pupil Access. Applications for voluntary aided, foundation, free schools and academies are made directly to the schools who should then notify Pupil Access of the outcome.

Pupils from Ukraine should be admitted, like any other children, in strict order of priority according to each school's published admission arrangements. Parents must be informed of the outcome of an in-year application within a maximum of 15 school days. Where all the schools within a reasonable distance of a child's home are full, fair access arrangements can be used to secure an offer of a school within 20 school days.

The DfE guidance also confirms that although the infant class limit of 30 pupils to a teacher applies, there are exceptions that can be made for vulnerable groups of children. This includes children who move into the area outside the normal admissions round, when there are no other available schools within reasonable distance.

Where possible and needed, schools are encouraged to admit children of guests from Ukraine as exceptions to the infant class size limit in the circumstances permitted by the Code: [School Admissions Code](#).

In-year admission applications should be completed for all pupils. A master spreadsheet will be kept of all the Ukrainian pupils admitted to Lancashire schools, and this will help inform any funding arrangements agreed going forward.

If a community or voluntary school has more than one place in a year group, and no enquiries have been received, there is no need to wait whilst an in-year admission form is processed. Due to the high volume of forms currently being received, it can take up to 10 days for a form to be dealt with, and children should not be kept out of school unnecessarily.

Where there is significant pressure for places however, it is important that in-year admissions are co-ordinated to ensure that they are dealt with equitably. Where school places are scarce, they need to be offered in priority order against published admission criteria, and the Pupil Access team need to be aware of any places offered, as this informs the numbers on roll data.

It is known that a number of children have already been admitted to schools. Where a place has been offered, it would be helpful if an in-year admission form be completed retrospectively to inform the overview spreadsheet of pupils. The in-year admissions mailboxes in the three areas are as follows:

IYANorth@lancashire.gov.uk

IYASouth@lancashire.gov.uk

IYAEast@lancashire.gov.uk

For non-routine enquiries regarding school admissions, a dedicated mailbox has been set up: UkrainianSchoolAdmissions@lancashire.gov.uk. Lisa Goodall from the Pupil Access Team will manage this mailbox and respond to any queries that are raised.

Supporting and Integrating Ukrainian Children and Young People in School

Schools admitting new Ukrainian pupils can receive support and advice from the Ethnic Minority Gypsy Roma Traveller Achievement Service. We provide support to schools for ethnic minority pupils, including international new arrivals, English as an Additional Language learners, and asylum seeker and refugee pupils. All schools with international new arrivals, including Ukrainian pupils, can receive an advice visit (which is funded, so free of charge to schools in Lancashire). At these visits, advice on integrating and teaching new arrivals and resources are shared with staff and we also provide information on our wider offer (which includes staff training, an induction toolkit for new arrivals and EAL tutor support).

How to arrange for EAL support

To refer, please complete the e-form on the Schools' Portal, which you can find under 'E' for EAL. A member of our team will then contact you to arrange a visit to give advice (free of charge to Lancashire schools for new arrivals) and to discuss any further support.

For any other queries, please contact us on: ema.support@lancashire.gov.uk

We have also produced and collated some resources that may be useful to schools with new Ukrainian pupils:

- [English-Ukrainian resources at Twinkl](#)
- Online [English - Ukrainian dictionary | Glosbe](#)
- Induction Pack for International New Arrivals - [Resources \(lancsngfl.ac.uk\)](#)
- Learning resources for pupils who are new to English: [Resources : EAL Resources for Home Learning \(lancsngfl.ac.uk\)](#)
- Leaflets for parents on UK Education system - [Parental Involvement - The Bell Foundation \(bell-foundation.org.uk\)](#) and other leaflets for parents [Resources : EAL Resources for Schools : Bilingual Parent Resources \(lancsngfl.ac.uk\)](#)

Access to early years funded places for Ukrainian Families

The DfE have confirmed that families arriving under the Ukraine Family Scheme, or the Local Sponsorship Scheme for Ukraine will be able to access the early years entitlements for 2-, 3-, & 4-year-olds in the 'normal' way and they are not proposing to make any changes to the existing eligibility criteria. This means that Ukrainian families will be able to access early years funded places as follows:

Universal Offer for 3- & 4-Year-Olds

- Children will be able to access the 15 hours universal entitlements as soon as families arrive, providing it is the term after the child's 3rd birthday.
- Families do not have to wait to be issued with a NI number and do not need to in receipt of benefits.

For more information about the 15 hours universal offer, please see our [webpage](#).

Extended Offer for 3- & 4-Year-Olds

- Children will be able to access the 30 hours extended entitlements from the term after the child's 3rd birthday providing their family meets the prescribed the eligibility criteria.
- This means that both parents who have arrived (or one parent in a single parent family) must have a NI number and be in paid employment (earning between the minimum and maximum thresholds) or be in receipt of one of the qualifying benefits.

For more information about eligibility for the extended offer and how to apply, please see our [webpage](#).

2-Year-Old Offer

- Children will be able to access a 2-year-old funded place, from the term after their 2nd birthday providing their family meets the prescribed eligibility criteria.
- This means that families will need a NI number and be in receipt of one of the qualifying benefits or earning less than the minimum income thresholds before they can apply for a place.
- Families should then be directed/supported to complete an application through our [online eligibility checker](#)
- Families who do not have access to the internet can complete the application process by contacting our Family Information Service by email fis@lancashire.gov.uk or by telephone 0300 123 6712.
- We will then carry out the required checks and, if eligible, issue their 'golden ticket' letter and voucher code.

For more information about eligibility for 2 year old funded places, please see our [webpage](#).

Schools and settings should claim for any Ukrainian children accessing an early years place in the normal way i.e. through the school census/headcount, or via a supplementary claim where the children take up a place after the census/headcount week.

Free School Meals

The Inland Revenue ECS checker is used to check entitlement to receive free school meals. For a check to be undertaken, one of the parents needs to be in receipt of the qualifying benefits. Benefit claims will not be processed by the DWP until a National Insurance number has been issued. It is understood that the allocation of N.I. numbers is being fast tracked, but in the meantime, there is no discretion to provide free meals until a benefit application has been approved.

Lancashire Schools Forum Meeting Schedule 2022/23

Autumn Term

Meeting	Day	Date	Time	Venue
Schools Forum Induction	Thursday	15-Sep-22	10:00 – 13.00	Savoy Suite
Schools Block Working Group	Tuesday	20-Sep-22	10:00 – 13.00	Savoy Suite
High Needs Block Working Group	Tuesday	27-Sep-22	10:00 – 13.00	Savoy Suite
Early Years Block Working Group	Tuesday	04-Oct-22	13.00 – 16.00	Savoy Suite
Lancashire Schools Forum	Tuesday	18-Oct-22	10:00 – 13.00	Savoy Suite
High Needs Block Working Group	Tuesday	29-Nov-22	10:00 - 13.00	Savoy Suite
Early Years Block Working Group	Thursday	01-Dec-22	13.00 – 16.00	Savoy Suite
Schools Block Working Group	Tuesday	06-Dec-22	10:00 – 13.00	Savoy Suite

Spring Term

Meeting	Day	Date	Time	Venue
Chairman's Working Group	Tuesday	10-Jan-23	10:00 – 13.00	Savoy Suite
Lancashire Schools Forum	Thursday	12-Jan-23	10:00 – 13.00	Savoy Suite
High Needs Block Working Group	Thursday	02-Mar-23	10:00 – 13.00	Savoy Suite
Early Years Block Working Group	Tuesday	07-Mar-23	13.00 – 16.00	Savoy Suite
Schools Block Working Group	Thursday	09-Mar-23	10:00 – 13.00	Savoy Suite
Lancashire Schools Forum	Thursday	16-Mar-23	10:00 – 13.00	Savoy Suite

Summer Term

Meeting	Day	Date	Time	Venue
Early Years Block Working Group	Thursday	08-Jun-23	13.00 – 16.00	Savoy Suite
High Needs Block Working Group	Tuesday	13-Jun-23	10:00 – 13.00	Savoy Suite
Schools Block Working Group	Tuesday	20-Jun-23	10:00 – 13.00	Savoy Suite
Lancashire Schools Forum	Tuesday	04-Jul-23	10:00 – 13.00	Savoy Suite

All meetings are scheduled to take place at The Exchange, County Hall but may be conducted virtually