



Shropshire Council  
Legal and Democratic Services  
Shirehall  
Abbey Foregate  
Shrewsbury  
SY2 6ND

Date:

**Committee:  
Schools Forum**

**Date:** Thursday, 12 December 2024  
**Time:** 8.30 am  
**Venue:**

You are requested to attend the above meeting.  
The Agenda is attached

Tim Collard  
Assistant Director - Legal and Governance

**Members of Schools Forum**

Mark Rogers  
Marilyn Hunt  
Stephen Matthews  
Reuben Thorley  
Sandra Holloway  
Alison Ashley  
Georgia Moss  
Mark Cooper  
Bill Dowell  
Carla Whelan  
Sue Lovecy  
Sarah North

Sarah Finch  
Lisa Henshall  
Rachel Williams  
Sarah Godden  
James Pearson  
James Staniforth  
John Hitchings  
Shelly Hurdley  
Sian Lines  
Charles Thomas  
Andrew Smith

Your Committee Officer is:

**Jo Jones** DSG Funding Co-Ordinator, Learning and Skills – People Directorate  
Tel: 01743 254343  
Email: [Jo Jones@shropshire.gov.uk](mailto:Jo.Jones@shropshire.gov.uk)

# AGENDA

**1 Apologies**

**2 Minutes and Matters Arising - 7 November 2024 (Pages 1 - 10)**

Paper A attached.

**3 Schools Funding Arrangements 2025-26 Update (Sam Bradley) (Pages 11 - 14)**

Paper B attached.

**4 Consultation on the Central Retention of Dedicated Schools Grant from April 2025 (Sam Bradley) (Pages 15 - 26)**

Paper C attached.

**5 Central School Services Block 2025-26 (Stephen Waters) (Pages 27 - 50)**

Paper D attached.

**6 Communication**

**7 Future meeting dates**

Thursday 9 January 2025 (Provisional)	8.30 – 10.30	Microsoft (MS) Teams
Thursday 23 January 2025	8.30 – 10.30	Microsoft (MS) Teams
Thursday 20 March 2025	8.30 – 10.30	Microsoft (MS) Teams
Thursday 19 June 2025	8.30 – 10.30	Microsoft (MS) Teams
Thursday 11 September 2025 tbc	8.30 – 10.30	Microsoft (MS) Teams
Thursday 13 November 2025 tbc	9.00 – 11.00	Face to Face tbc

Date: 12 December 2024

Time: 09.00 to 11.00.

Venue: MS Teams

**A**

Public

**MINUTES OF SCHOOLS FORUM HELD ON 7<sup>TH</sup> NOVEMBER 2024 – HELD VIA MS TEAMS****Present****School Forum Members**

Bill Dowell (Chair)  
Mark Rogers – Primary Headteacher  
Sian Lines – Diocese of Hereford  
Andrew Smith – Independent Post 16  
James Staniforth – Post 16  
Sarah North – Primary Headteacher  
Stephen Matthews - Primary Governor  
Sarah Godden - TrustEd  
Reuben Thorley – Secondary headteacher  
Rachel Williams – Primary Headteacher

**Officers**

David Shaw  
Andy Nicholls  
Samantha Bradley  
Lisa Taylor  
John Rowe  
Stephen Waters  
Helen Owen

**Members**

Caroline Clode

**Observers**

Nick Bardsley

The chair welcomed all to the meeting.

**1. Apologies**

Apologies had been received from John Hitchings, Shelly Hurdley, Sarah Finch Lisa Henshall and Marilyn Hunt

**2. Election of Chair**

Bill Dowell was re-elected unanimously as Chair.

John Hitchens was elected unanimously as Vice Chair.

**3. Minutes and Matters Arising**

The minutes were accepted as a true record.

David Shaw updated Schools Forum on the matters arising from the last meeting.

- The link to the Shropshire Ordinarily available Provision (SOAP) framework has been circulated.

**DS**

- The link to the public consultation for the draft SEND and AP Strategy and Outcomes Framework has been shared.
- Meeting for Schools Forum in person has been delayed until 2025.

4. **Verbal Update on Shropshire Council Financial Sustainability**  
David Shaw updated Schools Forum

- **Quarter 1 Financial Monitoring report**
  - £62.5m savings set out for 24/25 in the medium-term financial strategy (MTFS) approved in February 24
  - Quarter 1 overall position – £38.5m forecast overspend.
  - Mostly from savings where work is still underway around delivery, also pressure in social care.
  - Made highest savings ever last year, those needed in this year are more complex.
  - £46m of savings now identified for delivery by end of March 2025 – this is already more than the £41m savings delivered in the whole of 2023/24.
  - Service reviews and re-sizing of services/teams currently underway.
  - Quarter 2 monitoring position will be reviewed by Cabinet on the 20th November 2024.
- **Critical Spending Guidance**  
Andy Begley, Chief Executive and James Walton, Executive Director of Finance implemented critical spending only during August 2024, so that all spending is reduced to only what is absolutely essential.  
This means:
  - Expenditure essential to delivering services (with maximum efficiency)
  - Existing and necessary payroll and pension costs
  - Goods and services already received on receipt of this guidance
  - Expenditure required through existing legal agreements and contracts (that cannot be challenged or minimised)
  - Expenditure funded through ring-fenced grants (delivering outputs with maximum efficiency)



- Expenditure essential in achieving value for money and/or mitigating additional in-year costs.
- **Impact on Traded Services and Education Settings**
  - Traded activity continues – in line with the Critical spending guidance.
  - Benchmarking activity underway in relation to Traded Services to Schools - levels of fees and charges and services provided.
  - Interesting to note the experience of Birmingham City Council and the decision to remove almost all Traded Services to Schools, with the report noting challenges with their finance system combined with an under recovery of costs IRO £2m per year.
  - Review underway with Corporate Finance and an external partner regarding 'full cost recovery' of all Traded or Commercial Services.
  - This work will inform the 2025/26 de-delegation consultation that will be shared in the next couple of weeks in preparation for decisions to be made at the December Schools Forum meeting.

Mark Rogers and Rueben Thorley raised questions on whether there was a suggestion that Shropshire would be following Birmingham in how they do traded services.

David Shaw said that he would circulate the papers regarding the work that Birmingham is doing in the team's chat. He pointed out that there is clearly a difference in scale between schools in Birmingham and Shropshire, that there is a clear message from schools and Bureaus that they would like to retain links with the council and that all potential changes would be brought to Forum as always, and that it was a matter of raising awareness of conversations that are being held.

#### **Dedicated Schools Grant Monitoring 2024-25**

5. Stephen Waters presented his paper.
  - The 2024-25 forecast outturn position for the DSG is a £5.142m in-year deficit
  - This deficit needs to be added to the £2.304m DSG deficit carried forward from 2023-24 resulting in a forecast cumulative DSG deficit of £7.446m



## **De-delegated Items**

### **o Maternity Supply Cover**

- Forecast overspend of £0.161m against the £0.267m de-delegated budget
- As expenditure in 2023-24 totalled £0.267m, there is a significant increase
- Forecast level of expenditure of £0.427m is higher than previous years so could be a one-off

## **Early Years Block**

- Shropshire's Early Years Block DSG allocation for 2024-25 is £29.140m as of July 2024
- The indicative allocations for entitlements will be updated following new termly headcounts. The final Early Years Block DSG allocations will be based on (five-twelfths January 2024 PTE census numbers) + (seven-twelfths January 2025 PTE census numbers)
- The forecast outturn position is a £0.018m overspend against a provisional budget of £29.140m. This relates to the £0.396m centrally retained budget relating to staffing.
- There are no variances to budget forecast against the large allocations for 3-4 year olds, 2 year olds and under 2's

## **High Needs Block**

- The forecast outturn position for the High Needs Block is an in-year deficit of £4.965m against a centrally controlled High Needs Budget of £32.337m. This budget excludes the place funding element of the High Needs Block totalling £9.936m.
- Shropshire's 2024-25 High Needs Block DSG of £42.272m has increased by £2.116m compared to the £40.156m allocation in 2023-24. This 5.3% increase is a smaller percentage increase than the previous year's increase.

## **Top Up funding**

- There is an overspend of £0.122m relates to the top-up funding paid to mainstream schools. As anticipated, there has been a large increase in top-up funding to mainstream schools reflecting increasing requests for EHC Needs Assessment and issuing of EHC plans



- There is a £2.742m overspend on top-up funding to special schools.
- Explained by changes to top-up funding levels payable to 2 Shropshire Council special schools as reported to Schools Forum in the June meeting.
- With Severndale Specialist School, an annual review process was undertaken to review each pupil's needs and therefore the appropriate banding level. The banding levels were increased and pupils allocated to appropriate banding levels and the resulting changes backdated to the start of the 2023/24 academic year. As a result, a one-off payment of £2.274m was made to the school.
- This review of, and subsequent increase in, banding levels across the Council's special schools aligns with the strategy to build capacity in these settings where appropriate

### **Independent Special Schools**

- Increase in demand shown by increase in numbers
- Increase in average termly cost per placement (both due to price inflation pressures and additional staffing support – increasing complexity). Typical placement cost at our most frequently used provider is £60,000 to £72,000 per annum which is over double the cost of a Shropshire Special School
- More frequent use of independent alternative providers, particularly in relation to children who are post 16

### **SEN Support Services**

- There is a forecast overspend of £0.430m against the SEN Support Service budget of £2.121m. Similarly to 2022-23 and 2023-24, the overspend in 2024-25 relates to staffing overspends where additional staff have been employed to meet increased demand
- Overall position
- The Council's DSG financial position of a forecast cumulative deficit of £7.446m as at the end of the 2024-25 financial year reflects a continuing pressure on the total High Needs budget as expenditure continues to increase sharply year on year. This increase has been particularly pronounced over the last 2 financial years; 2023-24 and 2024-25



- The government's Budget for 2025-26. £1bn of additional funding has been earmarked for High Needs, recognising that the number of children with SEND is increasing and the associated costs of SEND provision has become one of the leading drivers of financial pressures for local authorities
- As it stands, there is a DSG Deficit statutory override in place until March 2026. This means that any deficit associated with the DSG is kept off the councils' balance sheet
- If the override is not extended, the High Needs deficit will have an impact on the council's overall financial position

Mark Rogers asked what share of national funding is allocated to Shropshire.

David Shaw shared the most recent update on the timeline of information being shared with local authorities but said that it is unfortunately not yet known what share Shropshire would be getting.

There was discussion amongst Schools Forum Members about how the extra funding will be allocated and what Share Shropshire will be getting.

### **School Revenue Funding Update 2025-26**

6. Samantha Bradley communicated an update that the National Funding Formula will be out by the end of November and that hopefully she will be able to update Schools Forum further in December.

### **Early Years and Childcare Funding Update**

7. Andy Nichols presented his paper.

#### **New Personnel**

- Andy Nicholls – Education and Childcare Sufficiency Manager
  - Dan Steele – Senior Project Officer – Early Years Sufficiency
- Latest Sufficiency Data
- 92.97% of issued codes validated by settings – Highest in West Midlands, First vs Statistical Neighbours, Third Nationally (7/11/24)
- Early Years Readiness
- All children 9m+ entitled to 30 hours childcare from September 2025
  - Predicted need of EXTRA 420 places September 2025





- Capital allocation of £541K
  - Spend to date approx. £400k (300 places)
  - DFE / Childcareworks happy with our approach – ahead of where most LAs currently are.
- Funding (to be approved)
- Additional £1.6m in relation to teacher's Pay Award September to March 24/25
  - All funding to be passed on to settings
  - £4.95ph to £5.03ph
  - Backdated to September 2024
  - Awaiting latest funding announcements – challenge for providers re NI and Minimum wage changes

Schools Forum Voted in Favour of the local authorities proposed plans for use of the additional EY budget grant.

Andy Nichols expressed his concern regarding sustainability and said that he would keep Forum informed of any developments.

AN

## 8. **Shropshire Ordinarily Available Provision (SOAP)**

John Rowe presented his paper.

### **Aims from September 2024**

#### **Priority 1: All schools and settings understand and are aware of Ordinarily Available Provision.**

Autumn Term

- Education Quality Advisers introduced to primary and secondary schools.
- Support visits undertaken with respect to inclusive practice in settings and schools
- Three locality-based SEND and Inclusion network meetings shared with schools
- Production of SEND and Inclusion newsletter to include 'SOAP spotlight'.
- Implementation of 'test and learn' project with group of Schools Spring and Summer Terms
- Finalise EY and Post-16 OAP
- SOAP relaunch and sharing of best practice in SEND and Inclusion network meetings
- Completion of school and LA commissioned SEND reviews within schools and settings to provide support and challenge with respect to OAP.



- Test and learn project with focus group schools to review their use of SOAP and develop further their implementation. Use feedback provided on successes and challenges to feed into SOAP review.

- Draw out key themes to develop a CDP offer.

• **Priority 2: SEND Hubs begin to work towards becoming 'centres of excellence'**

Autumn Term

- Education Quality Advisers linked to hubs to provide challenge/support building on SeaView trust reviews

- Implementation of SEND hubs quality improvement cycle.

- SEND hub network established which provides supervision, support and coaching to hub leaders.

- Development of SEND Hub quality assurance criteria and risk assessment tracking systems that supports the QA of hubs.

- School performance monitoring to include SEND hub categorisation (to inform future challenge/support by EQAs)

Spring and Summer Terms

- School performance monitoring to include SEND hub categorisation (to inform future challenge/support by EQAs)

- Further monitoring of implementation SOAP within SEND Hubs through SEND review process.

• **Priority 3: All schools and settings have access to models of best practice to build their capacity to meet the needs of CYP with SEND**

Autumn Term

- Relaunch and rebranding SENCo network meetings as SEND and Inclusion forums.

- EQA facilitated solution circles to provide support to SENCOs

- Review of systems with respect to Early Intervention Grant (EIG) and Graduated Support Pathway funding to include aspects of support.

- EQAs secured funding for SEND Outreach service funded through change programme

- Development of Resource Bank to underpin SOAPs Spring and Summer Terms

- School performance monitoring to include SEND hub categorisation (to inform future challenge/support by EQAs)

- Further monitoring of implementation SOAP within SEND Hubs through SEND review process.

- Delivery of SEND outreach support (4 x FT Outreach teachers (North, Central, South and EY specialist) – funded through



change programme in first instance (before moving to traded service)

• **Priority 4: Work towards a balanced position of HNB finances**

**2024/25**

- Develop enhanced provision in SEND hub capacity (including SEMH and increased secondary capacity)
- Opportunity for £250,000 allocation for Shropshire for inclusive practice to support outreach in schools
- 4 x FT Outreach teachers (North, Central, South and EY specialist funded by SEND and AP change programme for 1 year in first instance before moving to a traded model
- Begin work to support reduction in independent non maintained specialist school provision (INMSS) and move toward hub and to OAP)
- Identification (supported by parent carer engagement) of pupils whose needs could be better met within state-maintained provision.
- Begin reallocation of funding and adjustment of historic bandings to more appropriately support state-maintained provision.

**By 2029/30**

- Move towards model to enable more CYP to be supported within hubs/state-maintained provision.
- Further reduction of cost of INMSS to enable reallocation of funds for state funded provision.

Stephen Matthews said that the design was good and that he hoped that the timetable would be able to be stuck to as it was the help that schools desperately needed.

Stephen Matthews asked whether the quality advisors had been allocated to hubs.

John Rowe confirmed that advisors had been allocated, one per hub and another one for moderation purposes.

James Pearson asked whether priority 4 could be distributed as it wasn't in the original slides that were sent out.

John Rowe said that it would be sent out.

James Staniforth asked what finalising Post 16 entailed?

John Rowe said that it was about identifying what it looks like to provide a cohesive and easily understood plan as to what inclusivity looks like within post 16 provision and key to that would be working with post 16 providers.

James Staniforth asked if the risks of building up one provision to the detriment of another.

JR



John Rowe replied that this had been looked at and that is why the timetable is over a four- or five-year period.  
William Dowell asked if communication would be broadened to the wider community.  
John Rowe replied that a lot of work had been done to alert the wider SEN community.

### **Communications**

9.

Bill Dowell said that he had had the opportunity to meet Julia Buckley, the new MP for Shrewsbury and she had expressed an interest in engaging directly with Schools Forum. He pointed out that as we now have four new Shropshire MPs, they need to be briefed on the work of Schools Forum, if Forum are agreeable then a document stating where we are nationally could be produced and sent to them from Bill Dowell as Chair and Leslie Picton as Leader of the council.

**Schools  
Forum**

### **Future Meeting Dates**

10.

12 December 2024  
9 January 2025 (Provisional)  
23 January 2025  
20 March 2025  
19 June 2025  
11 September 2025 (tbc)  
13 November 2025 (tbc)

Meeting was closed at 10.20am



## Schools Funding Arrangements 2025-26

**Responsible Officer** Sam Bradley, Performance & Integration Manager  
email: [samantha.bradley@shropshire.gov.uk](mailto:samantha.bradley@shropshire.gov.uk)

### Summary

Known details of the Government's recent funding announcements for 2025-26 for schools, including high needs and early years, were provided to Schools Forum in November 2024.

This report details specific local funding arrangements from April 2025 for consideration and agreement by Schools Forum in relation to:

- the potential transfer of funding between blocks

### Recommendation

Schools Forum is recommended to consider and agree the specific funding arrangements from April 2025 as detailed within this report, specifically:

- Schools Forum is asked to agree the recommendation to transfer any remaining balance, up to 0.5% of the Schools Block, into the High Needs Block after fully funding individual schools in line with the NFF.

### REPORT

#### Background

1. In July 2017, the Government announced the introduction of a national funding formula (NFF) for allocating the Schools Block of the Dedicated Schools Grant (DSG) to local authorities from April 2018.
2. Local authorities, in consultation with their schools and Schools Forum, continue to have some local flexibility on the basis for distributing funding to schools through the National funding formula in 2025-26. It remains the Government's intention to fund all schools nationally via the NFF in the future.
3. Following consultation with Shropshire schools and Schools Forum, Shropshire's local formula for distributing the Schools Block to individual schools and academies has mirrored the NFF since 2018-19.

4. Schools Forum members are asked to consider and agree specific arrangements for 2025-26 as detailed within this report. Shropshire Council's Cabinet will make a final decision on the school funding arrangements for 2025-26 in February 2025.

### **Update to the schools NFF for 2025-2026**

On 07 October 2024 the LA received a brief update on the Schools Funding Arrangements for 2025-26, which indicated that due to timing of the general election, the publication of the notional schools and high needs national funding formula (NFF) allocations for 2025-26 was delayed. On 28 November 2024 the LA received the NFF allocations.

Along with the guidance, the Government has published provisional local authority level allocations for 2025-26 for the schools and high needs blocks within the DSG and notional 2025-26 national funding formula school level allocations.

### **School Revenue Funding Arrangements 2025-26**

The actual primary unit of funding (PUF) and secondary unit of funding (SUF) which will be used to calculate each local authority's schools block allocation has been published for 2025-26. For Shropshire these equate to £5,661 per pupil and £6,829 per pupil, respectively. As a comparison, in 2024-25 Shropshire's PUF was £5,273 and SUF was £6,375.

These units of funding will be applied to pupil numbers recorded in the October 2024 school census to determine final schools block allocations for 2025-26. These will be issued to local authorities slightly later than usual given the delay from DfE.

In 2025 to 2026, each local authority will continue to set a local schools funding formula, in consultation with local schools. To ensure a smooth transition towards the direct NFF, local authorities will continue to be required to bring their own formulae closer to the schools NFF. As a reminder, Shropshire has mirrored the NFF in its local schools funding formula since 2018-19.

### **The main features in the schools NFF for 2025-26 are:**

- the basic entitlement values, FSM6 values, the lump sum and the minimum per pupil funding values have increased to reflect the rolling in of the three separate pay and pensions grants from 2024 to 2025: TPAG, TPECG and CSBG.
- a further increase has then been applied to these same factors to cover the remaining costs of the 2024 teachers' pay award in mainstream schools, so that the full 12 months of salary costs are fully funded at a national level
- on top of this, a further overall increase has been applied to school- and pupil-led factors, as well as to the split sites factor



- through the minimum per pupil funding levels, every primary school will attract at least £4,955 per pupil, and every secondary school at least £6,465 per pupil
- the funding floor will be “cash flat” at 0% so that schools will be protected from per pupil cash reductions in their pupil-led funding
- the only structural changes being made to the NFF in 2025 to 2026 are in relation to the PFI factor, which are detailed in the policy document

The guidance has been updated to help LA’s review their notional SEN budget calculations and to help schools understand what the notional SEN budget is for.

All LA’s should review this calculation each year alongside their local formula to make sure that their schools’ notional SEN budget is a realistic amount for meeting the costs of additional SEN support up to £6,000 per pupil, noting that any shortfall in this notional budget for particular schools where a standardised calculation does not work can be met from additional high needs targeted funding.

High needs top-up funding should be allocated in addition to the notional SEN budget for SEN support costs in excess of £6,000 per pupil. [The notional SEN budget for mainstream schools: operational guidance 2025 to 2026 - GOV.UK](#)

### **High Needs Funding Arrangements 2025-26**

In 2025 to 2026, high needs funding is increasing by a further £1 billion to help local authorities and schools with the increasing costs of supporting children and young people with SEND. Most of this increase will be allocated through the high needs NFF, which sees a 9% increase in funding:

- the funding floor will be set at 7% – so that every local authority sees a per-head increase in funding of at least this level – with gains capped at 10%
- pay and pensions funding- including the core schools budget grant – for special schools and AP will continue to be allocated outside of the NFF, through a separate grant to local authorities

### **Central school services funding**

The main features of central school services funding in 2025 to 2026 are:

- the total provisional funding for ongoing responsibilities is £342 million in 2025 to 2026. No local authority will see a reduction in per pupil funding for central services of more than minus 2.5% – which is the same protection as in 2024 to 2025.



- the total funding for ongoing responsibilities includes an additional £4 million to be allocated to local authorities to compensate them for increases in copyright licenses costs

Funding for historic commitments continues to be reduced in 2025-26 by 20% from local authorities' 2024-25 allocations. As in 2024-25, historic commitments funding will be protected from dropping below the total value of ongoing prudential borrowing or termination of employment costs, based on evidence received by the department.

### Transfer of Funding between Blocks

5. The Schools Block remains ringfenced in 2025-26 but local authorities retain limited flexibility to transfer up to 0.5% of their Schools Block funding into another block with approval of Schools Forum. To transfer an amount above 0.5%, approval would need to be sought from the Secretary of State for Education
6. In previous financial years (apart from 2023-24 and 2024-25 due to affordability), Shropshire Schools Forum approved a transfer up to 0.5% of the Schools Block to the High Needs Block to support the growing pressures on the high needs budget. Agreement was given to transfer remaining Schools Block budget (up to 0.5%) after fully funding schools in line with the NFF each year, including transitional protections and caps. Balances of £784,000 (0.49%), £397,000 (0.25%), £842,000 (0.5%) and £876,218 (0.5%) and £949,077 were transferred to the High Needs Block in previous years.
7. For 2025-26 due to increased cost pressures within the High Needs funding it is our intention to transfer up to 0.5% of the Schools Block budget into the High Needs Block, should this be available after funding schools in line with the NFF.
8. Until the October 2024 school census data is run through the NFF for 2025-26 for individual schools, it is not possible to confirm if there will be any Schools Block balance remaining in next financial year. October 2024 census data will be made available to the local authority in mid-December and work will take place through January 2025 to calculate individual school budget shares for 2025-26 mirroring the NFF factor values.
9. Schools Forum is asked to agree the recommendation to transfer any remaining balance, up to 0.5% of the Schools Block, into the High Needs Block after fully funding individual schools in line with the NFF.





## Consultation on Central Retention of Dedicated Schools Grant From April 2025

### Introduction

On behalf of Shropshire Schools Forum, the views of maintained schools are being sought on the central retention of Dedicated Schools Grant (DSG) in the next financial year, 2025-26. Schools Forum is committed to consulting with maintained schools ahead of a Forum meeting on 12 December 2024 at which decisions on the de-delegation and top slicing of DSG from April 2025 will be taken.

### Background

Schools Forum is a legally constituted advisory and consultative group, made up of representatives from the maintained, academy and wider education sectors, who work with the local authority on issues related to school funding. One of their key areas of work is in relation to the school funding formula and the retention of a small part of the overall DSG to underwrite the costs of services, centrally managed by the local authority on behalf of maintained schools, given the economies of scale and value for money for schools this can realise.

The Government's school revenue budget settlement guidelines allow local authorities, following consultation with the maintained schools' community and with Schools Forum approval, to centrally retain DSG through de-delegation and top slicing. These retention methods are as follows:

- De-delegation – centrally held budgets within the Schools Block of DSG can be de-delegated from maintained schools by the sector representatives on Schools Forum, with decisions taken on an annual basis.
- Top-slicing – in December 2016, the Government's school revenue settlement allowed local authorities to retain some of their Schools Block of DSG to carry out statutory duties for maintained schools, previously funded through general duties Education Services Grant (ESG), which was removed in September 2017.

The impact in 2024-25 of the decisions taken by Schools Forum in December 2023 are summarised in the table below giving actuals reflecting academy conversions to July 2024:

Decision	Total	Primary Per Pupil	Secondary Per Pupil
<b>De-delegation (maintained primary and secondary):</b>			
Pupil growth contingency	£53,709	£5.43	-
Maternity cover	£266,945	£25.61	£25.61
Trade union duties	£27,807	£2.67	£2.67
School improvement (primary)	£157,879	£6.48 + £902/school	-
School improvement (secondary)	£546	-	£1.04
<b>Top slice (maintained primary and secondary):</b>			
Redundancy fund	£166,841	£16.01	£16.01

Statutory school finance	£33,368	£3.20	£3.20
Statutory human resources and health and safety	£69,312	£6.65	£6.65
Education welfare and inclusion	£200,408	£19.23	£19.23

This consultation document will examine each of the areas for which delegated funds are taken from maintained schools and seek views on a number of options for how to proceed on each in 2025-26. A simple return has been produced for collecting feedback from schools, which will be collated and inform the report that will be produced for the decision-making meeting of Schools Forum on 12 December 2024. **The consultation will run until Tuesday 03 December 2024**

It is important to understand that Schools Forum has the choice, for each budget area, between de-delegating/top-slicing or not. This means that **any decisions taken will impact on all maintained schools from April 2025.**

### Planned Academy conversions

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There are currently seventeen maintained primary schools with a planned conversion date before 1<sup>st</sup> April 2025. This means the number of maintained schools is expected to reduce from 76 to 59 by 1<sup>st</sup> April 2025. It is therefore important this year to understand the effect this would have on the per pupil rates for de-delegation and top slicing, should these academisations proceed by the 1<sup>st</sup> April 2025. It is hard to calculate the reduction each area may see in costs, if these conversions go ahead, and we have therefore kept the costs at what we believe is needed for the current number of maintained schools. It is hopeful that these costs will reduce in year and then reductions can be made for the following year on the per pupil costs. We have included an estimated per pupil cost based on the number of pupils currently and the anticipated number of pupils if the planned academy conversions all take place by the 1<sup>st</sup> April 2025.

### De-delegation

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This section looks at each of the support areas for which funding can be de-delegated from maintained schools. Historically, reports have been taken to the late autumn term meetings of Schools Forum to secure formal decisions for the following financial year. The table below summarises these decisions since 2015-16.

	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Pupil growth	£160,000	£159,770	£320,230	£150,170	£100,000	£95,000	£50,000	£30,000	£35,000	£53,709
Maternity cover	£334,000	£321,570	£499,260	£410,000	£260,000	£236,713	£228,947	£270,000	£250,000	£266,945
Insurance	£24,450	£23,280	£22,760	£0	£0	£0	£0	£0	£0	£0
Trade union duties	£53,180	£50,400	£50,020	£43,600	£27,772	£24,241	£25,000	£25,000	£25,000	£27,807

An important consideration when looking at whether a budget should be de-delegated, is the impact on schools resulting from delegation, because **with delegation comes responsibility**. This means that the responsibility for the delegated budget line – for example, paying for staff maternity cover – transfers to the school and any costs have to be met from the school's

delegated budget. The de-delegated funds have therefore provided something of an insurance policy for schools against one-off hits to their budget, which can have a significant impact on schools with tight budgets and modest contingencies.

## 1. Pupil growth contingency – primary only

A contingencies budget de-delegated from maintained primary schools to allow additional funding to be targeted at schools where pupil numbers increase by at least 15% of their funded number on roll. Controls limit allocations to actual additional costs incurred by a school as a direct result of increased pupil numbers.

A key consideration is delegated responsibility. In this case, by not de-delegating, there would be no contingency for pupil growth from April 2025 and so schools would have to absorb cost pressures until the increased pupil numbers worked through from the school census in October 2025, which would result in an increased delegated budget from April 2026. In most cases, given the forecast data provided to schools each year by the local authority on pupil numbers, schools should be alert to such growth and be able to budget plan for the lagged funding. Such growth in pupil numbers will tend to impact from the beginning of an academic year, with the reception intake, which means that the lagged funding generally follows two terms later.

In 2024-25 this budget has seen NOR decrease following academy conversions, and we therefore suggest keeping the fund at £50,000, however, the outturn position for 2023-24 was £55,000 against de-delegated funds of £35,000 relating to 4 schools.

### **Pupil growth contingency – options for 2025-26:**

- a. De-delegate funding from primary maintained schools as in previous years, is anticipated to be £50,000, the per pupil amount is higher due to planned academy conversions during 2024-25 and therefore a per pupil amount of £6.75 in 2025-26 is required.
- b. Fully delegate funding and responsibility to maintained schools, meaning that schools would be liable for funding pupil growth from their individual delegated budgets from April 2025.

## 2. Maternity cover

Funds the salary costs of any member of school staff on maternity leave in the maintained primary and secondary sector, meaning the schools are only liable for the costs of the replacement employee.

A decision not to de-delegate this budget from April 2025, would mean that maintained schools would be responsible for meeting all maternity pay costs of school staff from their individual delegated budgets. Schools would be able to access commercially available products/policies, some combining maternity cover with sickness cover. The experience of academies is mixed – some are sourcing cover arrangements from the marketplace, while others are carrying the risk of meeting any maternity costs from their own budgets.

These options would be available to maintained schools if the decision is taken not to de-delegate funding for maternity cover. Schools would need to carefully consider the flexibility and 'headroom' within their budget (including reserves), as well as the age profile of their female staff. In financial planning terms this can be challenging, given the difficulty of predicting the need for maternity leave.

Shared parental leave (SPL) was introduced in 2015 to allow both parents to share the 52 weeks of leave available after the birth or adoption of a child. Shropshire has seen a relatively low take up of this right in the previous few years, however, there has been an increase in number of school staff taking Shared parental leave in 2024-25. The cost of “Shared parental leave” is borne by the Schools Maternity Pay pot, but the financial impact of any increase in take up is not yet fully understood. This is something that will need to be monitored going forward.

Current projections indicate that the de-delegated budget of £266,950 for maternity cover will be overspent by £161,035 with forecasted spend of £427,985. This builds on an overspend of £17,114 in 2023-24. The forecast with the planned academy conversions removed is £366,430. This means that the per pupil rates in 2025-26 will need to increase to £46.23 in order to maintain budget in line with demand.

**Maternity cover - options for 2025-26:**

- a. De-delegate funding from primary and secondary maintained schools as in previous years, is anticipated to be £366,430, the per pupil amount is higher due to planned academy conversions during 2024-25 and increased forecast spending on this budget line.
- b. Fully delegate funding and responsibility to maintained schools, meaning that schools would be liable for funding maternity cover from their individual delegated budgets from April 2025.

**3. Trade union duties (referred to as facilities time)**

This funding is de-delegated for the costs of trade union representatives supporting their members in maintained schools through what is commonly referred to as facilities time. The funding provides cover for, among other things: carrying out trade union duties, attending union training, undertaking health and safety functions, and accompanying members attending hearings, for example disciplinary or grievance. There is strong lobbying each year from the professional associations for these funds to be de-delegated.

Each union is required to attend a termly meeting with the local authority, called the Association Secretary Group. The membership of this group includes the local union representative from each recognised trade union and representatives from the Council’s human resources advisory team. This meeting is the mechanism which allows collective consultation and negotiation between the local authority on behalf of schools and the trade unions on behalf of their members. All human resources policies and procedures are consulted and agreed at these meetings. Schools would be required to consult with trade unions and their own staff if this were removed. The group also discusses other employment relations issues and maintains a positive dialogue between schools and unions which in turn supports positive employee/employer relationships.

If local trade union representatives were not funded via the facilities time, maintained schools would be able to consider using their delegated funding to secure local arrangements with the trade unions, in particular by pooling funding with other maintained schools and academies. This could lead to a fragmentation of the current arrangements across the school sector. Alternatively, it would mean each school would have to allocate funding for facilities time for all unions represented in their school and may lead to schools dealing with regional trade union representatives with little or no local knowledge. It is the

view of the local authority that this would not be as effective and efficient an arrangement as that which could be secured through continuation of de-delegation.

One of the options is to continue to operate a fixed budget for facilities time support to maintained schools, as has been the case in the last three years, which maintains and secures a baseline of funding to guarantee the required level of support to these schools from union representatives contracted to deliver this support. The budget has been set at a fixed de-delegated total of £28,000, with the per pupil cost determined by the number of maintained pupils at the time the budgets for 2025-26 are set.

Current projections indicate that the de-delegated budget of £27,800 will be overspent by £434 with forecasted spend of £28,234. This means that the per pupil rates in 2025-26 will need to increase to £3.53 in order to maintain a de-delegated budget of £28,000 taking into account planned academy conversions in 2024-25.

**Trade union duties - options for 2025-26:**

- a. De-delegate funding from maintained schools, as in previous years, is anticipated to be £28,000, the per pupil amount is higher due to planned academy conversions during 2024-25 and therefore a per pupil amount of £3.53 in 2025-26 is required.
- b. Fully delegate funding and responsibility to maintained schools, meaning that local arrangements for facilities time would need to be secured by individual schools and/or groups of schools in collaboration with trade unions.

#### **4. School improvement**

The funding for school improvement provides access to a range of services including:

- Routine visits by school improvement advisers. The frequency of these is determined by need as specified in Shropshire’s School Performance Monitoring (SPM) policy. Schools in need of low support may only receive an annual visit but schools in need of medium or high support may receive a minimum 6 or 9 visits.
- Ad-hoc support, visits and remote support to provide advice on emerging issues including complaints, school improvement, staffing issues etc.
- Access to Perspective Lite
- Ofsted support
- Headteacher recruitment support etc

For 2024-25, Schools Forum agreed to de-delegate £157,879 from maintained primary schools and £546 from maintained secondary schools to secure ongoing statutory school improvement support for the year through the Education Improvement Service (EIS). The School Improvement Monitoring and Brokering Grant (SIMBG) was also removed completely from 2023-24.

This is an area of support in which it is difficult to present an option for schools to assume delegated responsibility, or to present an option for schools to secure the support on a buy-back basis, given the statutory nature of the support being provided. Therefore, the only option being presented is for the continued de-delegation of funding for this statutory support.

The amount will be maintained at the same level as 2024-25.

**School Improvement – option for 2025-26**

De-delegate funding from primary and secondary maintained schools to maintain overall funding as at 2024-25 levels. The per pupil amount is anticipated to be higher due to planned academy conversions during 2024-25.

## Top slicing

This section looks at each of the support areas for which funding has been top sliced from maintained schools in the financial year 2024-25. These support areas were previously funded from general duties ESG and so, in the knowledge that this grant funding was being removed by the Government in September 2017, Schools Forum determined that - for the last four financial years – funding would be centrally retained in order to provide continuity of provision for maintained schools. This was based on the understanding and commitment to fully consult with schools on what would happen in each subsequent year, hence this consultation on top-slicing from April 2025.

## 5. Redundancy fund

This fund underwrites the costs of premature retirement and redundancy of staff in maintained schools. Schools Forum supported the principle of retaining a central fund for redundancy costs in maintained schools in previous years. In 2024-25 the contribution was £16.01 per pupil in maintained schools.

A decision not to top-slice funding from April 2025 would mean that individual maintained schools would be liable for meeting any redundancy costs from their delegated budget. This would present a potential financial risk and significant challenge for schools struggling to manage their budgets in year and with low levels of school balances to draw upon. Schools in the academy sector already face these financial challenges and so have to plan carefully and in a timely manner to manage such costs.

The costs of redundancy can vary significantly dependent on the grade of staff and length of service. The amount of expenditure during 2023-24 was £152,000 which was in line with £150,000 de-delegated.

Current projections indicate that the budget of £167,000 is forecast to be fully utilised during 2024-25, therefore this means that the per pupil rates in 2025-26 will need to increase to £21.07 in order to maintain a de-delegated budget of £167,000 taking into account planned academy conversions in 2024-25.

### **Redundancy fund - options for 2025-26:**

- a. Top-slice funding from maintained schools as in 2024-25. It is anticipated that the per pupil rate will be approximately £21.07 if all planned academy conversions go ahead.
- b. Fully delegate funding and responsibility to maintained schools, meaning that schools would be liable for funding all redundancy costs from their delegated budget from April 2025.

## 6. Statutory school finance

This centrally retained funding underwrites the costs of officer support for statutory financial functions on behalf of maintained schools, including: the monitoring and control of school

balances; advice and support to schools in financial difficulties; challenge to schools who are not exercising appropriate financial controls, and appraising and approving licensed budget deficits. This also includes completion of the APT and outturn budgets.

This is an area in which it is difficult to present an option for schools to assume delegated responsibility, or to present an option for schools to secure the support on a buy-back basis, given the statutory nature of the support being provided. Therefore, the only option being presented is for the continued de-delegation of funding for this statutory support.

Top slicing funding of £33,370 in 2024-25 contribute to the total cost of providing these statutory functions.

**Statutory school finance - option for 2025-26:**

Top-slice funding of £34,000 from maintained schools. It is anticipated that the per pupil rate will be approximately £4.29 if all planned academy conversions go ahead

## **7. Statutory human resources and health and safety**

A number of statutory and regulatory functions in the area of human resources and occupational health and safety were previously funded through general duties ESG. This is primarily because the local authority is the employer of staff in maintained schools, with the exception of voluntary aided schools, who directly employ their own staff. While maintained schools can secure advisory support through annual service level agreements, the costs of the functions previously funded through the general duties ESG are not costed into these agreements.

The areas of support covered by the £69,310 top-sliced in 2024-25 include health and safety, occupational health, recruitment, payroll and contracts, as well as HR advice.

A proportion of this centrally retained funding underwrites the costs of the statutory functions outlined in the Recruitment, Payroll and Contracts Service Level Agreement (SLA).

In addition, a significant proportion of this centrally retained funding underwrites the Health and Safety and Occupational Health SLAs. Such funding is required in order for the local authority to comply with its duties as the employer under the Health and Safety at Work etc. Act 1974 and the relevant statutory provisions. It is the view of the local authority that compliance with the above legislation cannot reasonably be achieved through tasks delegated to the governing bodies of schools. The centrally identified funding includes expenditure incurred by the local authority in monitoring the performance of such tasks by governing bodies and, where necessary, giving them advice.

The local authority view is that the above areas are difficult to present as an option for schools to assume delegated responsibility, or to present an option for schools to secure the support on a buy-back basis, given the statutory nature of the support being provided. Therefore, the only option being presented is for the continued de-delegation of funding for this statutory support.

**Statutory human resources and health and safety - option for 2025-26:**

Top-slice funding of £70,000 from maintained schools. It is anticipated that the per pupil rate will be approximately £8.83 if all planned academy conversions go ahead





## 8. Education Access Service

The top-slice in 2023-24 is partly funding education welfare, delivered through the Education Access Service (EAS). The service also receives grant funding from retained duties ESG (which the local authority continues to receive and is separate from the general duties ESG, which ceased in September 2017), as well as income from trading with academies.

The top-slice provides maintained schools with access to all EAS support including education welfare, attendance and inclusion/exclusion officers, child employment services and performance licensing.

The proposed EAS service delivery agreement model has been based on a daily rate built around the time required in maintained schools for strategic intervention and casework. For the separate service delivery agreement for inclusion services, a standard rate will be applied for maintained primary schools. A bespoke package can be offered to meet the individual requirements of the remaining maintained secondary and special schools. The two service delivery agreements will give maintained schools access to the full range of advice and support offered by EAS.

There are risks to maintained schools of not opting into a traded arrangement. They would need to be confident that they have the skills and underpinning knowledge they require within their own setting, or where they can secure this support from elsewhere and at what cost.

Top slicing funding of £200,408 in 2024-25 contribute to the total cost of providing these services.

### **Education Access Service - options for 2025-26:**

- a. Top-slice funding of £200,000 from maintained schools. It is anticipated that the per pupil rate will be approximately £25.23 if all planned academy conversions go ahead
- b. Fully delegate funding and responsibility to maintained schools, presenting buy-back arrangements through service delivery agreements from April 2025 for those seeking to secure ongoing education welfare and inclusion support for the areas currently covered by the top-slice.

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School	NOR	De -delegation								Top slicing								Notes
		Pupil growth contingency (primary)		Maternity cover		Trade Union duties		School Improvement		Redundancy		Statutory school finance		Statutory HR (H&S)		Education Access Service		
		A	B	A	B	A	B	Yes	No	A	B	Yes	No	Yes	No	A	B	
<b>Primary Schools</b>																		
1	Selattyn Primary School	83	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	Weston Rhyn Primary School	177	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Sheriffhales Primary School and Preschool	75	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	Norton in Hales CE Nursery and Primary School	83	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Gobowen primary	203	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Broseley C of E Primary School	236	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	St.Andrew's CofE Primary, Shifnal	378	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	Rushbury CE Primary School	55	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Blue Hills Federation	146	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	Belvidere Primary School	254	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	Westcliffe Federation Schools	258	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12	St Andrew's Primary School	74	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
13	Minsterley Primary School	134	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14	St Thomas and St Anne's CE Primary	81	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15	Oxon CE Primary School	422	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16	Albrighton Primary School & Nursery	324	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	Claverley CE Primary	102	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
18	Trinity CofE Primary School	153	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19	Highley Community Primary School	239	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTALS</b>		<b>3477</b>	<b>11</b>	<b>9</b>	<b>17</b>	<b>3</b>	<b>17</b>	<b>3</b>	<b>17</b>	<b>3</b>	<b>14</b>	<b>6</b>	<b>20</b>	<b>0</b>	<b>19</b>	<b>1</b>	<b>14</b>	<b>6</b>

I am not a primary school but an answer to question 6 was required to complete the form

We are applying to covert to academy status.

I have very significant concerns about this.

I fully understand why there will be increased costs even though it will have an impact on my budget. As a school looking to academise during the financial year (Sept) I am concerned though that I will be paying a full year of services that I possibly don't need. Is there precedent for what happens here?

I am not a primary school but an answer to question 6 was required to complete the form

<b>Secondary School</b>																		
1	The Community College Bishops Castle	525	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>TOTALS</b>		<b>525</b>	<b>TRUE</b>	<b>FALSE</b>	<b>TRUE</b>	<b>FALSE</b>	<b>TRUE</b>	<b>FALSE</b>	<b>TRUE</b>	<b>FALSE</b>	<b>TRUE</b>	<b>FALSE</b>	<b>TRUE</b>	<b>FALSE</b>	<b>TRUE</b>	<b>FALSE</b>	<b>TRUE</b>	<b>FALSE</b>

20	<b>OVERALL TOTALS</b>	<b>4002</b>	<b>11</b>	<b>9</b>	<b>18</b>	<b>3</b>	<b>18</b>	<b>3</b>	<b>18</b>	<b>3</b>	<b>15</b>	<b>6</b>	<b>21</b>	<b>0</b>	<b>20</b>	<b>1</b>	<b>15</b>	<b>6</b>
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Percentage of A or B - Yes or No	55%	45%	90%	15%	90%	15%	90%	15%	75%	30%	105%	0%	100%	5%	75%	30%
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Shropshire Maintained Schools  
% response from Schools

76  
26%

Shropshire Maintained NOR (Autumn 24)  
% response in pupils

10,255  
39%

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Date: 12 December 2024

Time: 08.30 to 10.30

Venue: (MS) Teams

**D**

Public

## CENTRAL SCHOOL SERVICES BLOCK 2025-26

**Responsible Officer** Stephen Waters  
e-mail: Stephen.a.waters@shropshire.gov.uk Tel: (01743) 258952

### Summary

1. In November 2024, the Education and Skills Funding Agency (ESFA) issued their technical note on the Central School Services Block (CSSB) and provisional CSSB allocations for 2025-26. Final allocations will be based on the 2025-26 pupil count.
2. The purpose of the CSSB is to provide funding to local authorities to carry out central functions on behalf of pupils in state-funded maintained schools and academies.
3. The funding is split into funding for historic commitments and funding for ongoing responsibilities.
4. For those centrally retained services categorised as historic commitments, Schools Forum approval is required on a line-by-line basis and the budget cannot exceed the value agreed in the previous funding period, and no new commitments can be entered into.
5. For 2025-26, the ESFA intend to reduce the historic commitments funding by 20% compared to their 2019-20 baseline. This reduction is in line with ESFA's previously stated policy to withdraw this funding over time.
6. The CSSB technical note issued by the ESFA states that "historic commitments funding will be protected from dropping below the total value of ongoing prudential borrowing or termination of employment costs, based on evidence received by the department". The appropriate evidence will be submitted by the end of January 2025 deadline and we will wait for the ESFA to confirm whether the funding will be protected.
7. For ongoing responsibilities, Schools Forum approval is required on a line-by-line basis and the budget can increase from year to year.
8. This report therefore presents a number of proposals on the retention of Dedicated Schools Grant (DSG) in 2025-26 to fund these statutory duties for which formal Schools Forum approval is required.

### Recommendation



9. Schools Forum notes that the historic commitments value within Shropshire’s CSSB funding allocation has been subjected to a 20% cut in funding by the ESFA in it’s 2025-26 provisional allocation. Consequently, the historic commitments element of Shropshire’s 2025-26 CSSB allocation has been reduced by £210,336 to £841,344.
10. Schools Forum consider and approve to the proposals presented in this report.

## REPORT

### Background

11. In 2018-19, Schools Block funding, for the first time, included the new Central School Services Block, determined by a separate national funding formula.
12. The purpose of the CSSB is to provide funding to local authorities to carry out central functions on behalf of pupils in state-funded maintained schools and academies.
13. The CSSB funding is split into funding for historic commitments and funding for ongoing responsibilities.
14. CSSB historic commitments funding for each local authority is equal to their 2017-18 baseline value submitted to the ESFA in April 2017 and confirmed by the ESFA in August 2017. These historic commitments are subject to a limitation of new commitments or increases in expenditure.
15. The funding for ongoing responsibilities comprised funding previously allocated through the retained duties element of the Education Services Grant (ESG) at a rate of £15 per pupil, plus funding for ongoing central functions such as schools admissions and the servicing of Schools Forum.
16. The CSSB national funding formula allocated funding to local authorities for ongoing responsibilities uses a pupil-led formula to establish a CSSB ongoing responsibilities rate per pupil. This is multiplied by the Schools Block pupil count from the latest census to arrive at each local authority’s final allocation.

### Shropshire’s Central Schools Services Block Allocation 2024-25

17. In 2024-25, Shropshire Council’s CSSB allocation totalled £2,432,928. The contributions levels or allocations for ongoing responsibilities plus the contributions for historic commitments were approved by Schools Forum on 30th November 2023 in “Paper D – Central School Service Blocks 2024-25” (based on a provisional allocation of £2,436,847).

	<b>2024-25 Allocation</b>
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<b>Historic Commitments</b>	
Termination of employment costs	£756,330
Prudential borrowing	£295,350
<b>Sub Total Historic Commitments</b>	<b>£1,051,680</b>
<b>Ongoing Responsibilities</b>	
Schools admissions	£282,330
Servicing of Schools Forum	£10,000
Other items (Copyright Licensing Agency fee)	£276,700
Former retained duties ESG	£816,137
<b>Sub Total Ongoing Responsibilities</b>	<b>£1,385,167</b>
<b>Total Central Spend</b>	<b>£2,436,847</b>

## Shropshire's Provisional Central Schools Services Block Allocation 2025-26

18. On 28 November 2023, the Department for Education issued provisional 2025-26 allocations for the CSSB. The technical note published states that "in 2024- 2025, for those local authorities that receive it, historic commitments funding has been reduced by 20%".
19. For Shropshire Council this means that the £1,051,680 historic commitments 2024-25 value in the table above has been subject to a 20% cut equal to £210,366 in determining the 2025-26 provisional historic commitments allocation of £841,344.
20. The CSSB technical note issued by the ESFA states that "historic commitments funding will be protected from dropping below the total value of ongoing prudential borrowing or termination of employment costs, based on evidence received by the department". Officers will submit evidence to the ESFA to show that the value of ongoing prudential borrowing and termination of employment costs is far greater than the level at which the historic commitments funding will be reduced to provisionally in 2025-26. We will wait for the ESFA to confirm whether the funding will be protected.
21. The ongoing responsibilities value of £1,381,248 for 2024-25 has been run through the national funding formula to arrive at a provisional 2025-26 allocation for ongoing responsibilities of £1,531,453. This represents an increase of 10.9% on the ongoing responsibilities value. The provisional total CSSB allocation for 2024-25 is £2,372,797.
22. In 2025-26, funding is also being rolled into the CSSB which was provided separately in 2024-25 in respect of increased copyright licences costs, issued in the November 2024-25



DSG, and Centrally employed teachers, through the Teachers' Pension Employer Contribution Grant (TPECG) and the Core Schools Budget Grant (CSBG). The value of the this funding rolled into the 2025-26 Ongoing Responsibilities funding is £158,190 which is greater than the £150,205 increase in this portion of the funding.

	<b>2024-25 Allocation</b>	<b>Provisional Total 2024-25 CSSB NFF Funding</b>	<b>Provisional % Change to CSSB Funding in 2023-24</b>
Historic commitments	£1,051,680	£841,344	20% reduction in line with ESFA's previously stated policy to withdraw this funding over time
Ongoing responsibilities	£1,381,248	£1,531,453	10.9% (funding rolled into the CSSB which was previously provided separately)
<b>Total Central Spend</b>	<b>£2,432,928</b>	<b>£2,372,797</b>	<b>-2.5%</b>

### Historic Commitments Approval

23. As outlined in Appendix A, historic commitments require Schools Forum approval on a line-by-line basis. The budget cannot exceed the value agreed in the previous funding period, and no new commitments can be entered into. To enable Schools Forum members to make a more informed decision to continue to approve funding the following paragraphs give more detail regarding what services are funded and any ongoing commitments.

### Termination of Employment Costs

24. This budget covers the ongoing termination costs for ex-Shropshire Council school staff. This historic pension commitment will eventually to be reduced to nil, but over many years.
25. The DSG baselining exercise carried out of by the ESFA established a baseline cost for termination of employment costs of £994,920. The total cost of these ongoing pension commitments is significantly higher than £994,920 with the Council also making a sizeable contribution. £994,920 is the maximum contribution permitted from centrally retained DSG on the basis that this budget line cannot increase in value compared to previous years and this was the level of contribution set in 2017-18.
26. For 2024-25, the recommended DSG level of £582,169 was approved in the Schools Forum Paper dated 2<sup>nd</sup> December 2021. This was on the basis that the submission of evidence to





the ESFA to protect this value was unsuccessful. Thankfully the evidence was approved and the figure was protected at £756,330.

27. For 2024-25, it is proposed that the £210,336 reduction in funding is set against this area in the event that the appeal to the ESFA to protect the value of ongoing prudential borrowing and termination of employment costs is not successful. In this instance it is proposed to reduce the £756,330 level from 2023-24 by £210,336 to £545,994. If the appeal to the ESFA to protect value of ongoing prudential borrowing and termination of employment costs is successful the value of “Termination of employment costs” will remain at the same level of £756,330 in 2024-25.

**Recommendation 2** - Maintained and academy school representatives agree to contribute £545,994 to fund a portion of these ongoing pension commitments in the event that the appeal to the ESFA to protect the value of ongoing prudential borrowing and termination of employment costs is not successful, a reduction of £210,336 compared to 2024-25.

### **Prudential Borrowing Costs**

28. The prudential borrowing costs budget heading covers expenditure incurred in the repayment of loans.
29. Shropshire Council has ongoing annual revenue costs of £295,350 for funding prudential borrowing relating to the Monkmoor Campus Project approved in 2006-07.
30. The rationale behind the project was to expand Severndale School to ensure that all Shropshire special needs pupils can be considered for a place in Severndale before a more expensive out of county place is deemed necessary. The delivery of this project delivered revenue savings against costs funded within the High Needs Block of DSG where placements are funded at expensive out of county, independent special schools.
31. Due to available financing from other areas of the schools capital programme on a cash flow basis the borrowing was not applied until 2010-11, with the first borrowing costs in 2010-11 and will thus be incurred until 2035-36.
32. Shropshire Council was required to evidence these costs to the ESFA as part of the DSG baselining exercise. A capital budget report for 2006-07, which approved the prudential borrowing together with the capital project appraisal form was submitted to the ESFA and the figure of £295,350 was approved as part of the Shropshire’s baseline.
33. As this is an ongoing cost commitment of £295,350 until 2035-36, it is not appropriate to target any of the £210,336 reduction in historic commitments DSG funding to this budget line.



**Recommendation 3** - Maintained and academy school representatives agree to continue to contribute £295,350 to fund the ongoing revenue costs of funding prudential borrowing for the Monkmoor Campus Project.

### **Ongoing Responsibilities Approval**

34. As outlined in Appendix A, funding for ongoing central functions previously retained from the School Block also require Schools Forum approval on a line-by-line basis. In contrast to the historic commitments discussed above, the ongoing central functions of school admissions, servicing of Schools Forum, copyright licensing and ongoing responsibilities formerly funded by retained duties ESG, are not subject to the limitation of no new commitments or increases in expenditure, or any % reduction in funding. This portion of the CCSB funding allocation has increased by 10.9% compared to 2024-25, however this increase relates to funding that has been rolled into this portion of the CSSB which was previously provided separately.

### **Schools Admissions**

35. Shropshire Council employs a School Admissions team to provide a comprehensive administrative service for the allocation of school places within statutory requirements through compliance with the School Admissions Code published by the Department for Education in 2014.
36. The Schools Admissions Team's core service includes:
- Exchange of application data with other local authorities
  - Production of the annual Parents' Guide
  - Input/import of application details
  - Submission of electronic transfer file to schools
  - Production of offer letters to parents on behalf of admission authority
  - Administration of review process/ offers refused
  - Maintenance of transfer group waiting list.
37. In addition, an extended chargeable service is offered to academies which provides support in meeting the legal responsibilities of an admission authority.
38. To discharge these statutory duties, local authorities are expected to retain some central DSG funding to fund the costs of the Schools Admissions Team. The 2024-25 initial budget allocation for the Schools Admissions team was £282,330, however the budget was revised to £308,150, during the 2024-25 budget setting process once further detail was known. An increased budget allocation of £322,150 is required for 2025-26. This increase of £14,000 would be met from the overall increase in CSSB allocation.



**Recommendation 4** - Maintained and academy school representatives agree to the increased charge of £322,150 for the provision of a School Admissions Team.

### **Servicing of Schools Forum**

39. The servicing of Schools Forum expenditure line covers all expenditure incurred in connection with the local authority's functions of running the Forum as defined under section 47A of the 1998 Education Act.
40. The 2024-25 budget allocation for the Servicing of Schools Forum was £10,000, and will be held at this level in 2025-26.

**Recommendation 5** - Maintained and academy school representatives agree to the budget of £10,000 for the servicing of Schools Forum.

### **Copyright Licenses**

41. As set out in the 2017-18 DSG Technical Note published by the Department for Education on 20 December 2016, the Department agreed with the following agencies to purchase a single national licence managed centrally for all state-funded schools in England:
  - Copyright Licensing Agency (CLA)
  - Education Recording Agency (ERA)
  - Filmbank Distributors Ltd. (for the PVSL)
  - Motion Picture Licensing Company (MPLC)
  - Newspaper Licensing Authority (NLA)
  - Schools Printed Music Licence (SPML)
  - Christian Copyright Licensing International (CCLI)
  - Mechanical Copyright Protection Society (MCPS);
  - Performing Rights Society (PRS), and
  - Phonographic Performance Limited (PPL).
42. This means that local authorities and schools do not have to negotiate individual licences. The Department for Education pays the cost, including VAT, to the agencies and provides this as a service to local authorities, at a charge. Local authorities can reclaim VAT on the charge. These arrangements cover academies as well as maintained schools and local authorities can hold this money centrally, rather than include it in school budgets.
43. The 2024-25 initial budget allocation for the annual copyright licensing invoice was set at £276,700, however the actual cost for 2024-25 has been confirmed as £296,896 in the ESFA's November 2024 DSG update. For 2025-26 we have been informed that the annual charge will increase to £317,976 with the ESFA rolling in £10,278 to help fund the additional cost of copyright licenses in 2025-26.



**Recommendation 6** - Maintained and academy school representatives agree to the increased charge of £317,976 for the annual copyright licensing fees.

### Ongoing Responsibilities that Local Authorities Hold for all Schools

44. The CSSB funds local authorities for the statutory duties they hold for both maintained schools and academies which was previously allocated through the retained duties element of the ESG.
45. Details of these retained ongoing duties are provided in Appendix B (Column 1).
46. £776,230 was included in Shropshire’s CSSB 2024-25 allocation to cover these duties.
47. Schools Forum is required to agree to the central retention of retained duties ESG and to enable Schools Forum members to make a more informed decision to continue to approve funding, Appendix C details how the Council apportions this £776,230 to cover these ongoing retained duties. £776,230 is the value available within the ongoing responsibilities allocation of £1,381,248 once the items above have been allocated.
48. It is important to note that in some cases the total cost of providing the statutory functions listed would be greater than the illustrative budget allocation. In these cases the Council subsidises the additional costs above and beyond the £776,230 allocation.

**Recommendation 7** - Maintained and academy school representatives agree to continue to contribute £881,327 to ongoing responsibilities that the local authority provides for maintained schools and academies as per the detail of these costs outlined in Appendix C.

49. The final table below illustrates what the proposed CSSB budget allocations above would be if all recommendations are approved.

	2024-25 Allocation	2025-26 Proposed Allocation if appeal successful	2024-25 Proposed Allocation if appeal unsuccessful
<b>Historic Commitments</b>			
Termination of employment costs	£756,330	£756,330	£545,994
Prudential borrowing	£295,350	£295,350	£295,350
<b>Sub Total Historic Commitments</b>	<b>£1,051,680</b>	<b>£1,051,680</b>	<b>£841,344</b>
<b>Ongoing Responsibilities</b>			



Schools admissions	£308,150	£322,150	£322,150
Servicing of Schools Forum	£10,000	£10,000	£10,000
Other Items (Copyright Licensing Agency fee)	£286,868	£317,976	£317,976
Former retained duties ESG	£776,230	£881,327	£881,327
<b>Sub Total Ongoing Responsibilities</b>	<b>£1,381,248</b>	<b>£1,531,453</b>	<b>£1,531,453</b>
<b>Total Allocation</b>	<b>£2,432,928</b>	<b>£2,583,133</b>	<b>£2,372,797</b>



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## Appendix A

### Schools forum approvals for centrally held funding

1. A number of the services that are covered by funding that is held centrally are subject to a limitation of no new commitments or increases in expenditure from 2017 to 2018.

1.1. This limit does not now apply to admissions or the servicing of schools forums.

1.2. Schools forum approval is required each year to confirm the amounts on each line.

1.3. The following table sets out the level of approval required for each service and for funding of brought forward deficits.

2. When using centrally held funding, local authorities must treat maintained schools and academies on an equivalent basis.

Centrally retained service (Where Applicable in Shropshire and decision required today in bold)	Approval required
<ul style="list-style-type: none"><li>high needs block provision</li><li>central licences negotiated by the Secretary of State</li></ul>	Schools forum approval is not required (although they should be consulted)
<ul style="list-style-type: none"><li>funding to enable all schools to meet the infant class size requirement</li><li>back pay for equal pay claims</li><li>remission of boarding fees at maintained schools and academies</li><li>places in independent schools for non-SEN pupils</li><li><b>admissions</b></li></ul>	Schools forum approval is required on a line-by-line basis

Centrally retained service (Where Applicable in Shropshire and decision required today in bold)	Approval required
<ul style="list-style-type: none"> <li>• <b>servicing of schools forum</b></li> <li>• <b>contribution to responsibilities that local authorities hold for all schools</b></li> <li>• contribution to responsibilities that local authorities hold for maintained schools (voted on by relevant maintained school members of the forum only)</li> <li>• <b>de-delegated services from the schools block (voted on by the relevant maintained school members of the forum only)</b></li> </ul>	
<ul style="list-style-type: none"> <li>• central early years block provision</li> <li>• any movement of funding out of the schools block</li> <li>• any deficit from the previous funding period that reduces the amount of the schools budget</li> <li>• any brought forward deficit on de-delegated services which is to be met by the overall schools budget</li> </ul>	Schools forum approval is required
<ul style="list-style-type: none"> <li>• capital expenditure funded from revenue <ul style="list-style-type: none"> <li>• projects must have been planned and decided on prior to</li> </ul> </li> </ul>	Schools forum approval is required on a line-by-line basis. The budget cannot exceed the value agreed in the previous funding period, and no new commitments can be entered into.



Centrally retained service (Where Applicable in Shropshire and decision required today in bold)	Approval required
<p>April 2013; no new projects can be charged</p> <ul style="list-style-type: none"> <li>• details of the remaining costs should be presented</li> <li>• <b>contribution to combined budgets</b> <ul style="list-style-type: none"> <li>• where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources</li> </ul> </li> <li>• <b>existing termination of employment costs</b> <ul style="list-style-type: none"> <li>• costs for specific individuals must have been approved prior to April 2013; no new redundancy costs can be charged</li> </ul> </li> <li>• <b>prudential borrowing costs</b> <ul style="list-style-type: none"> <li>• the commitment must have been approved prior to April 2013</li> <li>• details of the remaining costs should be presented</li> </ul> </li> </ul>	<p>Read <a href="#">establishing local authority DSG baselines</a> for more information.</p>

Centrally retained service (Where Applicable in Shropshire and decision required today in bold)	Approval required
<ul style="list-style-type: none"> <li>• funding for significant pre-16 <a href="#">pupil growth</a>, including new schools set up to meet basic need, whether maintained or academy</li> <li>• funding for good or outstanding schools with <a href="#">falling rolls</a> where growth in pupil numbers is expected within three years</li> </ul>	<p>Schools forum approval is required on a line-by-line basis, including approval of the criteria for allocating funds to schools</p>

## Appendix B

### Central services that may be funded with agreement of schools forums

1. The split of services between responsibilities local authorities hold for all schools, and those that relate to maintained schools only are shown in tables below.
  - 1.1. Responsibilities held by local authorities for all schools (shown in the first column) are funded from the central schools services block, with the agreement of schools forums.
  - 1.2. Responsibilities held by local authorities for maintained schools only (shown in the second column) are funded from maintained schools budgets only, with agreement of the maintained schools members of schools forums.
  - 1.3. We've included references to the relevant schedules in the current [schools and early years finance \(England\) regulations 2017](#).

#### Statutory and regulatory duties

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"><li>• Director of children's services and personal staff for director (Sch 2, 15a)</li><li>• Planning for the education service as a whole (Sch 2, 15b)</li><li>• Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)</li><li>• Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c)</li></ul>	<ul style="list-style-type: none"><li>• Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 2, 56)</li><li>• Budgeting and accounting functions relating to maintained schools (Sch 2, 73)</li><li>• Functions relating to the financing of maintained schools (Sch 2, 58)</li><li>• Authorisation and monitoring of expenditure in respect of schools which do not have delegated</li></ul>

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Formulation and review of local authority schools funding formula (Sch 2, 15d)</li> <li>• Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 2, 15e)</li> <li>• Consultation costs relating to non-staffing issues (Sch 2, 19)</li> <li>• Plans involving collaboration with other LA services or public or voluntary bodies (Sch 2, 15f)</li> <li>• Standing Advisory Committees for Religious Education (SACREs) (Sch 2, 17)</li> <li>• Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)</li> </ul>	<p>budgets, and related financial administration (Sch 2, 57)</p> <ul style="list-style-type: none"> <li>• Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 2, 58)</li> <li>• Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Sch 2, 59)</li> <li>• Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 60)</li> <li>• Investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Sch 2, 61)</li> <li>• Functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Sch 2, 62)</li> <li>• Retrospective membership of pension schemes where it would not be appropriate to expect a</li> </ul>

Responsibilities held for all schools	Responsibilities held for maintained schools only
	<p>school to meet the cost (Sch 2, 75)</p> <ul style="list-style-type: none"> <li>• HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Sch 2, 63); determination of conditions of service for non-teaching staff (Sch 2, 64); appointment or dismissal of employee functions (Sch 2, 65)</li> <li>• Consultation costs relating to staffing (Sch 2, 66)</li> <li>• Compliance with duties under Health and Safety at Work Act (Sch 2, 67)</li> <li>• Provision of information to or at the request of the Crown relating to schools (Sch 2, 68)</li> <li>• School companies (Sch 2, 69)</li> <li>• Functions under the Equality Act 2010 (Sch 2, 70)</li> <li>• Establish and maintaining computer systems, including data storage (Sch 2, 71)</li> <li>• Appointment of governors and payment of governor expenses (Sch 2, 72)</li> </ul>

**Table 8a: Central services responsibilities held by local authorities (statutory and regulatory duties)**

## Education welfare

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 2, 20)</li> <li>• School attendance (Sch 2, 16)</li> <li>• Responsibilities regarding the employment of children (Sch 2, 18)</li> </ul>	<ul style="list-style-type: none"> <li>• Inspection of attendance registers (Sch 2, 78)</li> </ul>

**Table 8b: Central services responsibilities held by local authorities (education welfare)**

## Asset management

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)</li> <li>• General landlord duties for all buildings owned by the local authority, including those leased to academies (Sch 2, 14b)</li> </ul>	<ul style="list-style-type: none"> <li>• General landlord duties for all maintained schools (Sch 2, 76a &amp; b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have:             <ul style="list-style-type: none"> <li>• appropriate facilities for pupils and staff (including medical and accommodation)</li> <li>• the ability to sustain appropriate loads</li> <li>• reasonable weather resistance</li> <li>• safe escape routes</li> </ul> </li> </ul>

Responsibilities held for all schools	Responsibilities held for maintained schools only
	<ul style="list-style-type: none"> <li>• appropriate acoustic levels</li> <li>• lighting, heating and ventilation which meets the required standards</li> <li>• adequate water supplies and drainage</li> <li>• playing fields of the appropriate standards</li> <li>• General health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974)</li> <li>• Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012)</li> </ul>

**Table 8c: Central services responsibilities held by local authorities (asset management)**

### Central support services

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• No functions</li> </ul>	<ul style="list-style-type: none"> <li>• Clothing grants (Sch 2, 52)</li> <li>• Provision of tuition in music, or on other music-related activities (Sch 2, 53)</li> <li>• Visual, creative and performing arts (Sch 2, 54)</li> <li>• Outdoor education centres (but not centres mainly for the</li> </ul>

Responsibilities held for all schools	Responsibilities held for maintained schools only
	provision of organised games, swimming or athletics) (Sch 2, 55)

Table 8d: Central services responsibilities held by local authorities (central support services)

### Premature retirement and redundancy

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 2, 77)</li> </ul>

Table 8e: Central services responsibilities held by local authorities (premature retirement and redundancy)

### Monitoring national curriculum assessment

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring of National Curriculum assessments (Sch 2, 74)</li> </ul>

Table 8f: Central services responsibilities held by local authorities (monitoring national curriculum assessment)

### Therapies

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>No functions</li> </ul>	<ul style="list-style-type: none"> <li>This is now covered in the high needs section of the regulations and does not require schools forum approval</li> </ul>

Table 8g: Central services responsibilities held by local authorities (therapies)



## Other ongoing duties

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"> <li>• Licences negotiated centrally by the Secretary of State for all publicly funded schools (Sch 2, 8); this does not require schools forum approval</li> <li>• Admissions (Sch 2, 9)</li> <li>• Places in independent schools for non-SEN pupils (Sch 2, 10)</li> <li>• Remission of boarding fees at maintained schools and academies (Sch 2, 11)</li> <li>• Servicing of schools forums (Sch 2, 12)</li> <li>• Back-pay for equal pay claims (Sch 2, 13)</li> <li>• Writing to parents of year 9 pupils about schools with an atypical age of admission, such as UTCs and studio schools, within a reasonable travelling distance (new addition to CSSB, to be included in 2018 to 2019 regulations)<sup>1</sup></li> </ul>	<ul style="list-style-type: none"> <li>• No functions</li> </ul>

**Table 8h: Central services responsibilities held by local authorities (other ongoing duties)**

<sup>1</sup>Funding for this duty was previously delivered to local authorities via a s.31 grant. Additional funding will be added to the CSSB baseline for this from 2018-19.

## Historic commitments

Responsibilities held for all schools	Responsibilities held for maintained schools only
<ul style="list-style-type: none"><li>• Capital expenditure funded from revenue (Sch 2, 1)</li><li>• Prudential borrowing costs (Sch 2, 2(a))</li><li>• Termination of employment costs (Sch 2, 2(b))</li><li>• Contribution to combined budgets (Sch 2, 2(c))</li></ul>	<ul style="list-style-type: none"><li>• No functions</li></ul>

**Appendix C**

Responsibilities local authorities hold for all schools (funding may be retained centrally from all schools with agreement of Schools Forum)	How much does it cost Shropshire per year to provide it?
<b><u>Statutory and Regulatory duties</u></b>	
Director of Children’s Services and personal staff for director (Sch 1, 20a)	£119,330
Planning for the education service as a whole (Sch 1, 20b)	£236,990
Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 1, 20d)	£71,360
Administration of grants (Sch 1, 20e)	
Authorisation and monitoring of expenditure not met from schools’ budget shares (Sch 1, 20fi)	
Formulation and review of local authority schools funding formula (Sch 1, 20g)	
Internal audit and other tasks related to the authority’s chief finance officer’s responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Sch 1, 20i)	
<b><u>Education Welfare Services</u></b>	
Functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Sch 1, 10c) School attendance (Sch 1, 11) Responsibilities regarding the employment of children (Sch 1, 29)	£157,130
<b><u>Asset Management</u></b>	
Management of the LA’s capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 1, 10a)	£148,607
General landlord duties for all buildings owned by the local authority, including those leased to academies	
Additional pension funding for centrally employed teachers	£147,910
<b>TOTAL</b>	<b>£881,327</b>

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