**Schools Forum 12 March 2014 – Dedicated Schools Grant (DSG) 2014 Strategic Reviews Matrix** Document CE Appendix 1

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| **Ref** | **Review** | **Relevant DSG Block** | **Key Aspects of the Review** | **Local Authority Strategic Lead** | **Local Authority to work with** | **Timescale for Reporting Back to the Forum** | **Timescale for Implementation of outcomes** |
| **1** | **Schools Forum - School Improvement** | **ALL** | * Overarching review area, pulling together all aspects listed in this Matrix into the Forum's primary consideration * Explore how we strengthen links between the Forum’s DSG financial decision making and school improvement strategies. * How do we better evaluate the educational impact of financial decisions? * What has been the impact of the new school surplus balances protocol? | Paul Makin | Schools Forum directly | Initial Summer Term 2014 (and then ongoing) | ASAP |
| **2** | **The High Needs Block – Quality and Future Affordability** | **ALL** | * Review whether our HNB expenditure profile is sustainable and the options available where this might not be, incorporating the forecasted costs associated with demographic growth. Required to inform the Forum’s DSG budget setting from April 2015. * How we ensure the quality of provision * How we evaluate the impact of HNB funding decisions | Andrew Redding / Bill Turner | SEN Reference Group and Schools Forum directly | Initial Mid Autumn Term 2014 (and then ongoing) | From April 2015 |
| **3** | **Implications of the National Funding Formula** | **ALL** | * Actions to respond to changes required by the DfE * Model the impact on 2015/16 allocations (on current formula) of removing the Minimum Funding Guarantee * Analyse the District-wide implications for current funding frameworks – what needs to change (and how)? How do we communicate with schools / academies? * Explore the knock on implications for key strategies e.g. Early Years, High Needs Provision, Child Poverty, Behaviour support. Make recommendations on the future direction of these areas * Consider “affordability” issues at a) DSG level (Block level) and b) individual institution level. Is our current DSG expenditure profile sustainable? If not, what is our response? Do we have institutions that will struggle to be financial viable? What is our response? * Consider the implications for the continued central management of certain DSG items – will this still be possible? | Andrew Redding | FFWG / EWYG / SEN Reference Group and Schools Forum directly | Expect main thrust of work late summer / early autumn 2014 | Expected from April 2015 |
| **4** | **New Approaches to Service Delivery (Children’s Services)** | **ALL** | * Progress the discussions begun with Schools Forum in December 2013 (and with headteachers on 13 January) exploring ways in which the delivery of services for children / young people and schools can change and the role of schools and academies in this. What are the opportunities and risks? * Improving understanding of the services available and how these are delivered or could be delivered in the future. * The redesign of catering / cleaning services (as discussed with the Forum in October 2013). | Michael Jameson  Tony Stephens | Themed working groups  Partnerships | Termly update reports  Update Late Summer Term 2014 | Expected from April 2015  Expected after April 2015 |
| **5** | **The impact of the Pupil Premium and our approaches to funding deprivation** | **SCHOOLS and HNB** | * Greater sharing spending and impact evaluation data with the Schools Forum (a recommendation of the Children’s Services Scrutiny Committee) to promote the better sharing of effective practice between schools / academies * Further work with schools and academies to develop a collective simple approach to the management of bursaries and other hardship funds for vulnerable pupils and families. | Cindy Peek  Matt Findull | Schools Forum directly  Business Managers Reference Group | Mid Autumn Term 2014  Late Summer Term 2014 | From January 2015  ASAP following report back |
| **6** | **Review of DSG Centrally Managed and Delegated Funds (continued review of specific items)** | **SCHOOLS** | * Further work on specific areas identified by the Forum’s Working Group, including:   + Trade Union Facilities Time for Health and Safety   + Funding of Early Childhood Services and Play Strategies   + The DSG’s contribution to school improvement capacity   + Fischer Family Trust licences   + Support services for pupils from Minority Ethnic Backgrounds | Paul Makin | Forum De-Delegated Working Group | Late Autumn Term 2014 | From April 2015 |
| **7** | **Admissions** | **SCHOOLS** | * Consider the financial / capacity pressures on admissions services (including the issues related to the October Census) and the options available. * What roles do schools / academies have in supporting pressures? How can the DSG provide more support? * What further action can be taken to reduce the high level of appeals (and the financial / administrative burden)? | Paul Makin | Small Specific Forum Working Group | Late Summer Term 2014 | From Autumn Term 2014 |
| **8** | **Continued development of the 2 Year Old Offer** | **EY** | * Review the number, distribution and take up of places. Is further action required to secure sufficiency and improve occupancy across all areas of the District? * Consider further capital support to secure places capacity. * Consider the processes that should be established to measure and monitor the educational impact of these places. * Consider whether the move to full participation led funding in 2015/16 create affordability / sustainability issues. | Susan Moreau / Andrew Redding | Early Years Working Group and Schools Forum directly | Autumn Term 2014 (interim report Mid Summer Term) | From April 2015 |
| **9** | **The future delivery of Children’s Centre Services** | **EY** | * The development / consultation / implementation of a new model of delivery. * The future role of schools and academies. * How will the future model be financed? | George McQueen | Children’s Centres & Public Consultation | Mid Autumn Term 2015 | From April 2015 |
| **10** | **Review of the Impact of Budget Reductions on Early Years HNB Strategies** | **HNB** | * Consider holistically the impact of budget reductions on services in support of early years children with additional needs. Identify risks for further consideration by the Forum to inform future funding strategies. | George McQueen | EYWG and Schools Forum directly | Mid Autumn Term 2015 | From April 2015 |
| **11** | **Behaviour Support Services** | **HNB** | * How do we evaluate quality and impact? * The co-ordination of a single strategy early years through to Post 16 * The continued development of primary behaviour strategies with BPIP, including the review of the role of the Behaviour Centres and the possible establishment of Primary ‘BACs’ mechanisms. * The continued development and implementation of the new operating model for the secondary-aged provisions financed by the DSG, including the BACs and PRU places. The strategy for the financing of additionally purchased places at the PRUs. | George McQueen | BPIP & BACs Strategic Group and the Schools Forum directly | Mid Autumn Term 2015 | From April 2015 |
| **12** | **HNB (Place-Plus related) review items to be managed by the SEN Reference Group** | **HNB** | * The financial issues associated with Personalised Budgets. * The ongoing review of Speech and Language Therapy Services. * Further development of the Place-Plus funding approach (lessons learnt). * Issues associated with the funding of Post 16 students under the Place-Plus model. * The options for a formula approach to funding high needs provision in Further Education Settings. * Capital costs faced by schools changing the nature of their resourced provisions and whether / how the DSG can support these. | Bill Turner / Andrew Redding | SEN Reference Group | Mostly Late Autumn Term 2014 (though FE will be reported in summer term) | Mostly from April 2015 (though FE likely from September 2014) |