

# Minutes (*Draft*)

## Schools Forum

Notes of meeting on 28<sup>th</sup> September 2022

### Members:

Steve Donegan (SD)	Primary School rep (Malmesbury) - Chair
Carla Chandler (CC)	PRU School rep (Melrose)
Emma Greer (EG)	Primary School rep (Pelham)
Hamish Dowlen (HD)	Secondary School Gov rep (Raynes Park High School)
Kirsten Heard (KH)	Secondary School rep (Raynes Park High School)
Martin Roughley (MR)	Primary School rep (Cranmer)
Fr Simon Peat (FSP)	Primary Governor rep (St Mary's)
Phyllis Sternberg (PS)	Academies rep (Beechholme)
Rachel Shephard-Walwyn (RSW)	PVI rep (Montessori Children's House)

### In Attendance:

Elizabeth Fitzpatrick (EF)	LBM CSF - Assistant Director for Education and Early Help
Patricia Harvey (PH)	LBM CSF – Finance
Richard Ellis (RE)	LBM - CSF Assistant Director for Strategy, Commissioning and Transformation
Colette Levingston (CL)	LBM CSF – Finance
Jayne Ward (JW)	LBM CSF – Finance
Robyn Northcott (RN)	LBM CSF – Note Taker

### Apologies:

Paul Lufkin (PL)	Primary School rep (Wimbledon Park)
Julia Waters (JW)	Secondary School rep (Ursuline)
Andrew Good (AG)	LBM CSF – Finance
Lee Mallin (LM)	Academies Governor rep (Harris Morden)

<b>1</b>	<b>Welcome and apologies</b>
	SD is stepping in as chair due to the absence of PL who has an Ofsted inspection at Wimbledon Park. SD welcomed the new members to the Schools Forum and apologies were noted.
<b>2</b>	<b>Minutes of previous meeting</b>
	The minutes of meeting held on 23 <sup>rd</sup> June 2022 were agreed for accuracy.
<b>3</b>	<b>Confirmation of membership / constitution (attached)</b>

	<p>Following the resignation of members at the end of the 2021/22 academic year, those vacancies have been filled. A 16-19 representative position has been sought unsuccessfully, and any suggestions would be welcomed.</p> <p>With regards to membership from faith schools, we have FSP as Catholic school governor and JW who is Headteacher at a Catholic secondary school. We do not currently have a Church of England representative and it was noted this would be good practice rather than a mandatory requirement.</p>
<b>4</b>	<p><b>Training - key roles and responsibilities</b></p> <p>Key points to note from PH's presentation:</p> <p>There is a public Merton Schools Forum webpage and meetings are open to the public to observe. This page contains details of the meetings and there is a requirement to upload the papers of the meeting to this webpage.</p> <p>Clerk to the Schools Forum is Robyn Northcott who undertakes an administrative role supporting the Forum.</p> <p>The purpose of the Schools Forum is to ensure all areas have a voice in relation to schools funding. There are 17 Schools Forum members who can vote on decisions.</p> <p>Specific decision making powers for the Forum including:</p> <ul style="list-style-type: none"> <li>• Formula - voting school, academy and early years members only</li> <li>• Certain central items expenditure</li> <li>• De-delegations (voting by phase)</li> <li>• Scheme for Financing Schools (schools members only)</li> <li>• Movement of up to 0.5% from the Schools Block to other blocks</li> </ul> <p>Sub-working groups of the Schools Forum can be set up as required. These groups may be to address the need for training or to focus on a specific area. There is currently a High Needs sub-working group.</p> <p style="text-align: center;"><b><u>Methods of communication:</u></b></p> <ul style="list-style-type: none"> <li>• Forum agendas and minutes</li> <li>• Forum reports</li> <li>• Forum verbal updates</li> <li>• Consultation exercises</li> <li>• School Finance updates</li> </ul> <p style="text-align: center;"><b><u>School Funding System:</u></b></p> <p>Funding for schools and academies comes via ring-fenced the Dedicated Schools Grant (DSG) which is made up of four funding blocks:</p> <ul style="list-style-type: none"> <li>• Schools Block</li> <li>• Early Years Block</li> <li>• High Needs Block</li> <li>• Central School Services Block</li> </ul> <p>The total DSG is £168m for 2022/23</p> <p><b><u>Schools Block</u></b></p> <p>This is distributed through a nationally prescribed framework (Authority Proforma Tool - APT). The Local Authority formula is limited to 13 factors and the Local Authority can request limited additional premises factors for example rent. The Education and Skills Funding Agency (ESFA) review the formula to ensure compliance.</p>

### High Needs Block

This block provides funding for special schools, alternative and PRU budgets, ARP units, academies and post-16 and central items to support SEN.

High needs pupils are funded on place plus system with a 3 element approach

Element 1 = place,

Element 2 = additional make up (to place),

Element 3 = top up

(Core, Additional and Top Up)

### Early Years Block

This is based on Early Years National Funding Formula (EYNFF) which supports nursery schools, nursery classes and PVI's.

This is a formula for 3 and 4 year olds, plus:

EY Pupil Premium Grant

Disability Access Fund / SEN Inclusion Fund

There is also a formula for 2 year olds.

The centrally retained amount is held by the Local Authority to fund the administrative back office functions.

### Central Services Schools Block

This funds the Local Authority's statutory responsibilities and is calculated on a formulaic allocation for ongoing responsibilities and a cash sum for historic commitments. This historic commitment is being reduced by 20% each year, eventually to be reduced to zero over time.

Pupil Premium Grant (PPG) is additional funding outside of the DSG - this is to raise attainment of disadvantaged pupils. This is based on:

- Children Looked After (CLA )
- Ever 6 Free School Meals\* (FSM) in primary and secondary
- Service Children

\*Ever 6 - any child who has received a Free School Meal at any time in the last 6 years generates the PPG funding.

There is a range of other Government grants which provide additional funding for schools outside of the DSG

### De-delegation

This is funding for de-delegated services and can be delegated from mainstream primary and secondary schools based on Schools Forum approval. This has to be approved on an annual basis. Schools are consulted on this through a consultation paper.

### Key strategic issues 2023/24:

- Merton are moving to adopt the National Funding Formula methodology. This formula is specific rates set by the DfE.
- There is additional funding for small and remote schools through the sparsity factor.
- Continued contribution to other blocks may be limited in 2023/24 due to reduced "growth fund" allocation and other SEN pressures, along with the Safety Valve programme.
- There are falling rolls in the primary sector.

### Early Years block

There has been a Merton early years census decline following the pandemic within the PVI sector.

A consultation response was submitted to the Government by the Local Authority which included other factors to be taken into account.  
Support into the Early Years Block from the Schools Block is unlikely in 2023/24 due to the ongoing pressures on the High Needs Block.

FSP queried if money will still be moved from the Schools Block to the High Needs Block as previously. PH confirmed that there is unlikely to be capacity to support the Early Years Block in light of the pressures on the High Needs Block as in recent years.

#### High Needs Block:

For the last four years there was an overspend for the High Needs Block of circa £25m. A transfer of 0.5% from the Schools Block to the High Needs Block was approved by Schools Forum.

Due to the Safety Valve programme, savings must be delivered or funding will not be received to offset the £25m deficit.

The Local Authority are implementing a strategy to reshape High Needs Block provision including increased special school provision and new SEN units in mainstream schools.

There was recently a DfE consultation on the Green Paper and White Paper and the outcome of those consultations are expected which may include some changes.

#### School Central Services Block

Reduction in Early Years budgets may cause additional costs for schools and statutory services.

#### Schools Facing Financial Difficulties

2020/21 was exceptional with regards to Covid. School balances have been artificially high due to additional Covid grants and there were reduced agency costs during this period. There has been a slight reduction in 2021/22 on reported school balances.

The Local Authority will continue to work with schools facing financial difficulty - the reduction in pupil numbers has also had an impact upon schools.

#### **Schools Forum annual cycle**

There is a statutory requirement that every Schools Forum has to meet a minimum of 4 times a year. The key meeting is around the setting of the formula and Schools Forum have to agree to this.

- November - Proposed formula allocation for next year is shared at this meeting. Following the meeting, all maintained schools are consulted on this and any alterations are made. Consultations are collated by the Local Authority and the formula is devised.
- January - held before final budgets are submitted to the DfE; DSG school funding allocations are agreed at this meeting. Responses to the consultation from schools are shared at this meeting.
- March - this meeting is in place for any Government updates and may be cancelled.
- June - the DSG outturn for the previous financial year is shared and there is a requirement that this is reported to schools.

EF noted that the Local Authority welcome the opportunity to have an ongoing dialogue with schools through the Schools Forum.

EF shared that the DfE monitor the way that Schools Forums operate and they have, on occasion, sent an observer to attend a Schools Forum meeting. The DfE have been in contact to request to observe a meeting - they will attend the meeting on 9<sup>th</sup> November.

The slides will be circulated following the meeting.

<b>5</b>	<b>DSG Safety Valve update</b>
	Next DSG deficit subgroup meeting – 17 <sup>th</sup> October 2022
	<p>RE provided an update on the Safety Valve programme:</p> <ul style="list-style-type: none"> <li>• We are 6 months into the 5 year programme.</li> <li>• Good progress has been made so far and the second monitoring return to the DfE has been submitted.</li> <li>• Following the July submission, there have been meetings with DfE Finance and SEN advisors, with positive feedback received. The first instalment of funding has been received.</li> <li>• Extra resources have been put in place - the Local Authority have put in £1.1m for extra staffing including SEN advisors, EHC Coordinators, a field-force team and additional commissioning posts who are looking at the independent sector.</li> <li>• The SENDIS team have been changing processes.</li> <li>• There had been rapid growth of EHCP numbers and this has stabilised in the last year - there are currently around 2500 EHCPs.</li> <li>• 58 additional ARP places and 80 new special school places have been created. The additional capacity created by the Whatley Avenue campus will bring a saving of around £1.1m a year.</li> <li>• Formal application for a special free school is being submitted this week which would provide up to 120 places. Potential sites will be identified with the DfE.</li> <li>• Work with the independent sector is challenging, particularly discussions around the inflation rate. The DfE gave an inflation rate of 2%, however it is likely that this will be around 5%. Independent schools are also dealing with rising costs such as pay demands and energy demands.</li> </ul> <p>The High Needs Sub-Group will be meeting in October and the aim for this year is for the group to meet prior to the main Schools Forum meetings for more detailed discussions to take place. The most recent Safety Valve submission will be taken to the meeting in October for scrutiny.</p> <p>FSP asked for further details on the application for a new special school. EF shared that the intention is to be able to offer education for children with EHCPs locally instead of having to use expensive non-maintained special school provision outside of the borough. Needs analysis will be used to identify the designation of the school in terms of the needs that can be met there.</p> <p>RE noted that there is higher level of involvement from the DfE than for previous free school applications which is beneficial.</p> <p>EF shared that previously under the Inner London Education Authority (ILEA), special schools were set up across London. When control moved from ILEA to local authority areas, some local areas, such as Wandsworth, ended up with more special schools than others, and this has had an impact on the availability of local provision.</p>
<b>6</b>	<b>Grant funding for Ukrainian Children in Schools</b>
	<p>PH shared a paper which explains how grant funding for Ukrainian Children is delegated to schools.</p> <p>The paper outlines what schools can support from the fund. There are conditions of the grant which stipulate the amount can be pooled for anything that would benefit a group.</p> <p>The first instalment (£144k) was received at the end of August. This is based on data entered on the Department for Levelling Up Homes and Communities system.</p>

	<p>The DfE have broken this down into early years, primary and secondary schools - PH would like to further break this data down into schools.</p> <p>EF noted that those arriving through the Friends and Family Scheme are not being funded by the DfE while those arriving through the Homes for Ukraine route are, and the reason for this is unclear.</p> <p>RE shared that, based on the last figures he has seen, that there were significantly more Ukrainian children arriving through the Friends and Family route than the Homes for Ukraine route. The Local Authority has lobbied through London Councils for equity between various schemes. The Home Office is the obstacle - different visas have different entitlement, and those on the Friends and Family Scheme route have less eligibility.</p>
<b>7</b>	<b>Any Other Business</b>
	<p>DfE briefings (attached)</p> <ul style="list-style-type: none"> <li>• A) Changes in school funding and local funding formulae 2023 to 2024</li> <li>• B) An introduction to high needs funding</li> </ul> <p>Papers were shared for information-only. Queries relating to these can be sent to EF, PH or AG.</p> <p>FSP noted the 5% pay award/rise and queried if any additional funding will be coming through the DfE. EF confirmed that this rise is currently unfunded, however the Local Authority are taking every opportunity to raise this with the DfE in a range of forums. There is an intention to collect school data of original budgets set and, based on unsupported pay rises, what the new forecasted budgets are for the end of the year. The rise is causing some schools to move further towards a deficit budget. There is also the added pressure of increased energy costs and although there will be some financial support from the Government for this, this is time-limited.</p> <p>SD queried when implementation guidance for School Business Managers will be received. EF will follow up.</p> <p>The next meeting is taking place in-person at Malmesbury Primary School at 4.30pm - SD noted that the School Streets Parking scheme ends at 3.45pm for those travelling by car.</p>

**Date of next meeting:**

**Wednesday 9<sup>th</sup> November, 4.30pm - Malmesbury Primary School**